Our Guest Manager

A Bed & Breakfast customer and reservation system for up to 8 units

User's Manual

Calendar Edition
v2.01.9
September 1, 2014

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Overview

What is the Our Guest Manager system

Our Guest Manager is an easy to use, feature-rich software system designed for Bed and Breakfast establishments with up to eight units.

It is a customer and reservation manager incorporating mailing list capabilities, and printable or email reservation confirmations and receipts.

Computer system requirements

Our Guest Manager is a stand-alone database program. The software will run on a Windows based PC computer with the following recommended system requirements –

- ✓ Windows XP Professional, Home Edition (Service Pack 3)
  - CPU: Pentium III 700 MHz or faster
  - Computer memory: 2 GB of RAM
  - 1024x768 or higher resolution video adapter and display
- ✓ Windows Vista Ultimate, Business, Home Premium (Service Pack 2)
  - CPU: 1 GHz or faster
  - Computer memory: 2 GB of RAM
  - 1024x768 or higher resolution video adapter and display
- ✓ Windows 7 Ultimate, Professional, Home Premium
  - CPU: 1 GHz or faster
  - Computer memory: 2 GB of RAM
  - 1024x768 or higher resolution video adapter and display

- ✓ Windows 8 Standard and Pro
  - CPU: 1 GHz or faster
  - Computer memory: 2 GB of RAM
  - 1024x768 or higher resolution video adapter and display

NOTE: Windows Administrator rights are required to install and run Our Guest Manager.

NOTE: If you are going to be using Our Guest Manager with an iPhone, iPod Touch or iPad, they must have iOS 6.0 or later installed to be able to run FileMaker GO v13 (available free on iTunes).

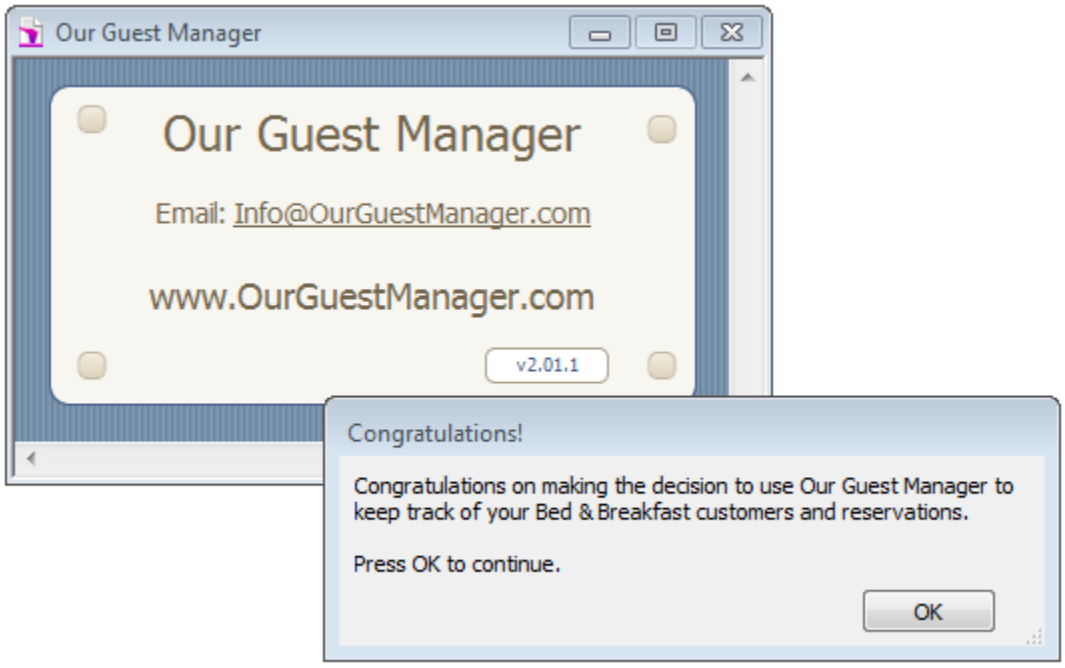
Getting Started

Once Our Guest Manager has been installed, you will find a new icon on your Windows Desktop. Double click on this icon to open the program.

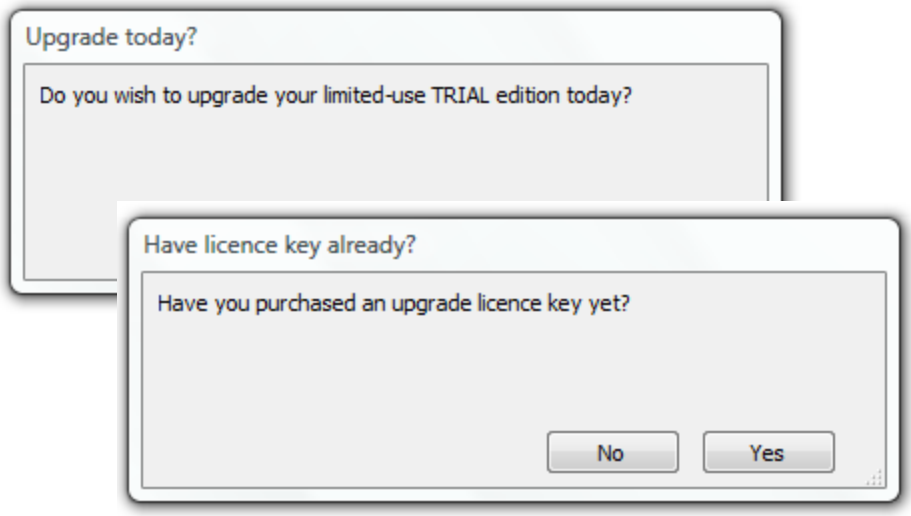
If this is the first time that you have opened the program it is likely that you have just downloaded it from our website www.OurGuestManager.com and it is a Trial Edition.

If so, you will be given the opportunity to try the software for 30 days or for a maximum of 50 customer or reservation entries. If you have already purchased an Edition Upgrade Licence Key you will have the chance to enter it.

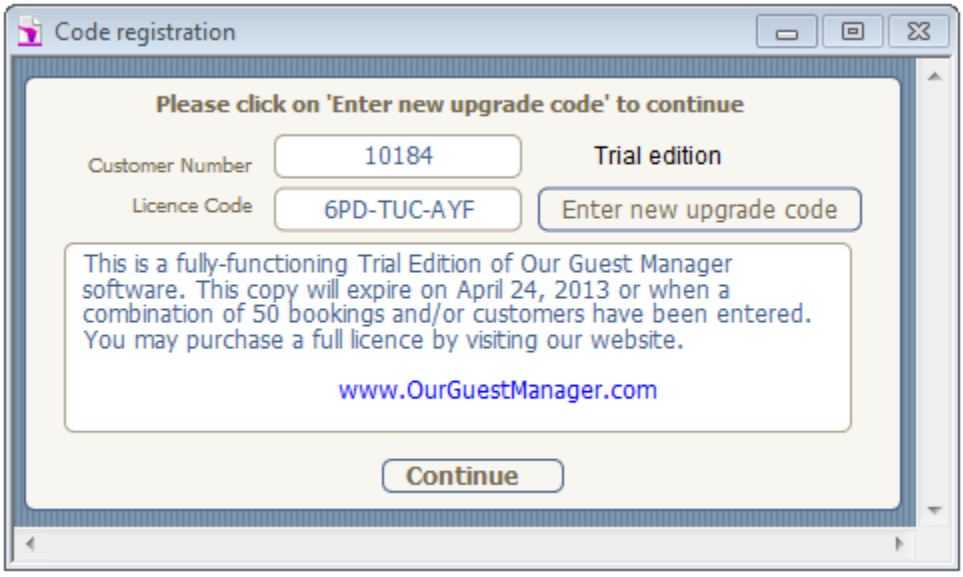
Entering your licence key


Our Guest Manager
Our Guest Manager
Email: Info@OurGuestManager.com
www.OurGuestManager.com
v2.01.1
Congratulations!
Congratulations on making the decision to use Our Guest Manager to keep track of your Bed & Breakfast customers and reservations.
Press OK to continue.
OK

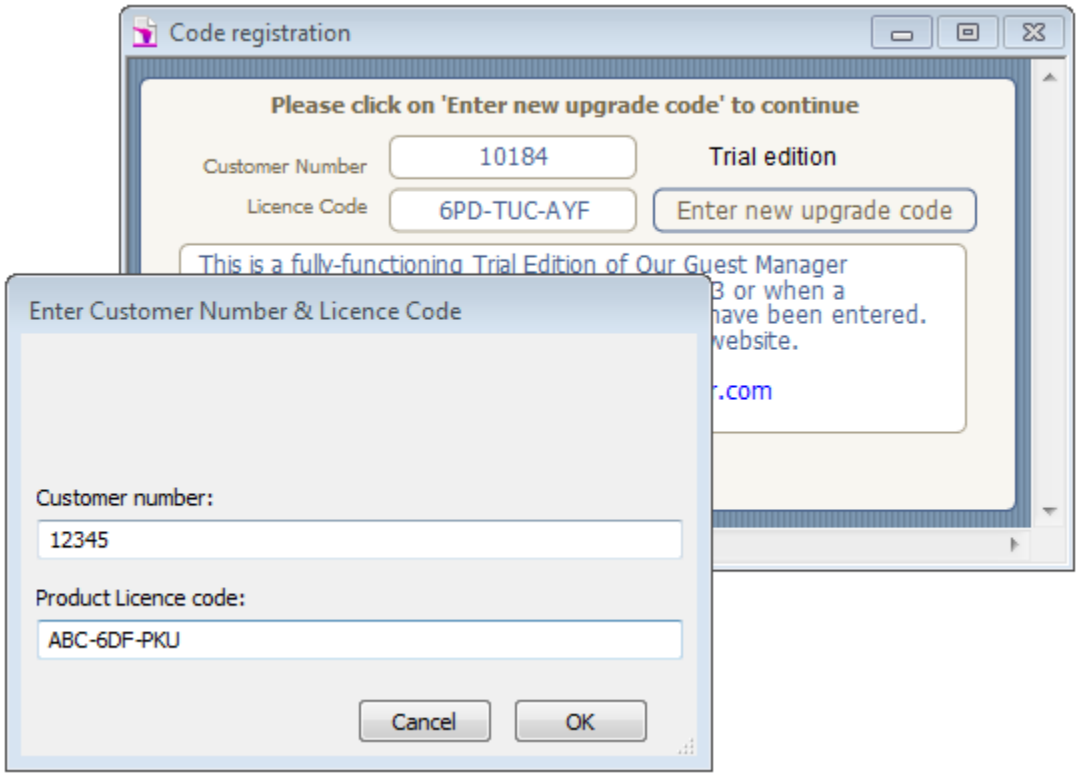
If you answer 'Yes'


Upgrade today?
Do you wish to upgrade your limited-use TRIAL edition today?
Have licence key already?
Have you purchased an upgrade licence key yet?
No
Yes

Answering 'No' gives you the option of going to www.OurGuestManager.com to purchase your licence key, or 'Yes' to see the Code Registration window.

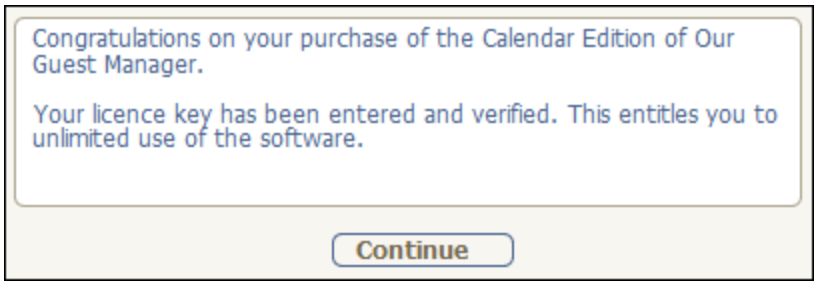

Code registration
Please click on 'Enter new upgrade code' to continue
Customer Number
10184
Trial edition
Licence Code
6PD-TUC-AYF
Enter new upgrade code
This is a fully-functioning Trial Edition of Our Guest Manager software. This copy will expire on April 24, 2013 or when a combination of 50 bookings and/or customers have been entered. You may purchase a full licence by visiting our website.
www.OurGuestManager.com
Continue

Click on the 'Enter new upgrade code' button to enter your code.



Make sure that you enter the 5-digit Customer Number and 9-character licence code exactly as you received in the email after purchase.

Successfully entering the customer information will show a confirmation screen indicating the Edition purchased.

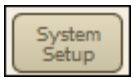

Congratulations on your purchase of the Calendar Edition of Our Guest Manager.
Your licence key has been entered and verified. This entitles you to unlimited use of the software.
Continue

Hit 'Continue' to go to the main entry screen.

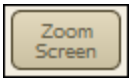
The customer entry screen

Explanation of screen functions

click to open the reports menu

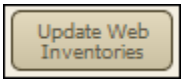


click to open the customizable default settings for your business

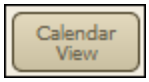


click to increase or decrease the current screen size

click to create a file to transfer to iOS device (iPhone/iPad)



click to open web viewer to up to 10 web search engines

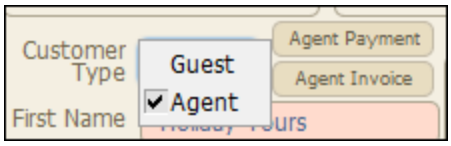


click to see room reservations in a month calendar view

click to create a new customer record

click to delete the currently viewed customer from the database

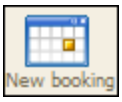
Customer record navigation



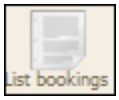
Select Guest or Agent customer type.
If Agent, create agent invoice or record bulk payment.

click to enter customer or booking search parameters

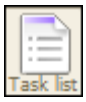
click to release your found set of records



click to create a booking for the currently viewed customer



click to create a report of all or future bookings entered



click to open the 'To Do' item database

click to open the up-to-date web version of this manual (requires connection to the internet)

click to close Our Guest Manager

check for room availability

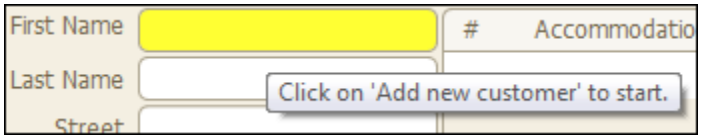
open notes in large window

Some commonly used buttons found throughout the system are –

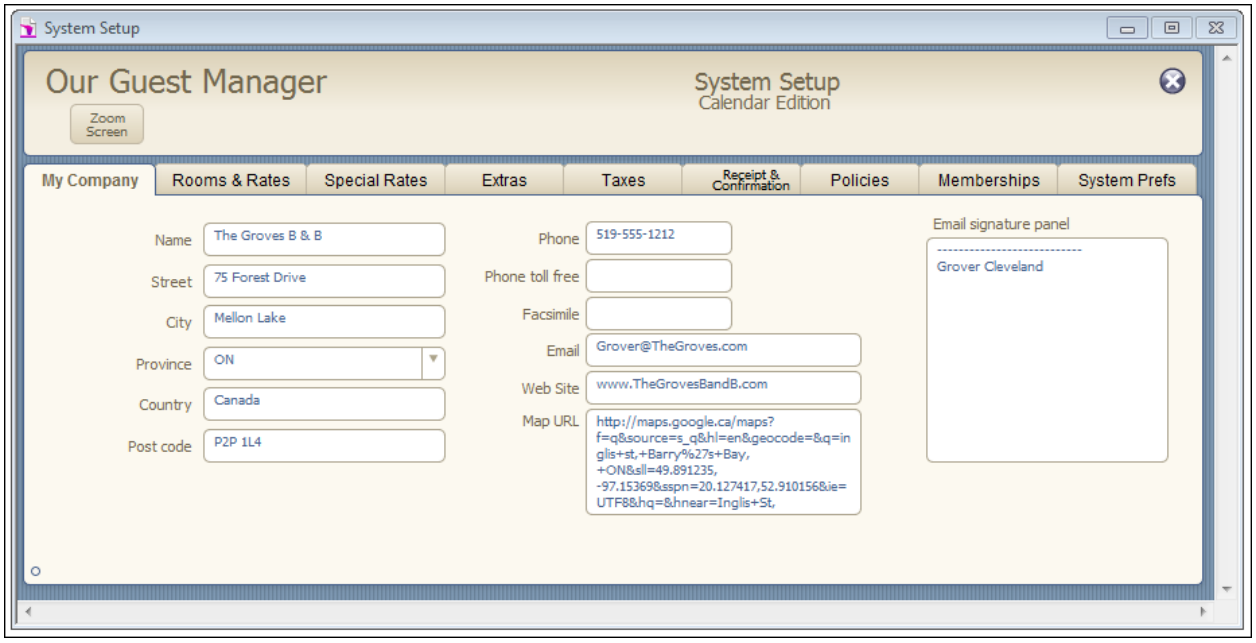
close current window

open contextual help

Hovering the mouse pointer over many fields shows small 'tooltips' with helpful hints.



The system set-up section

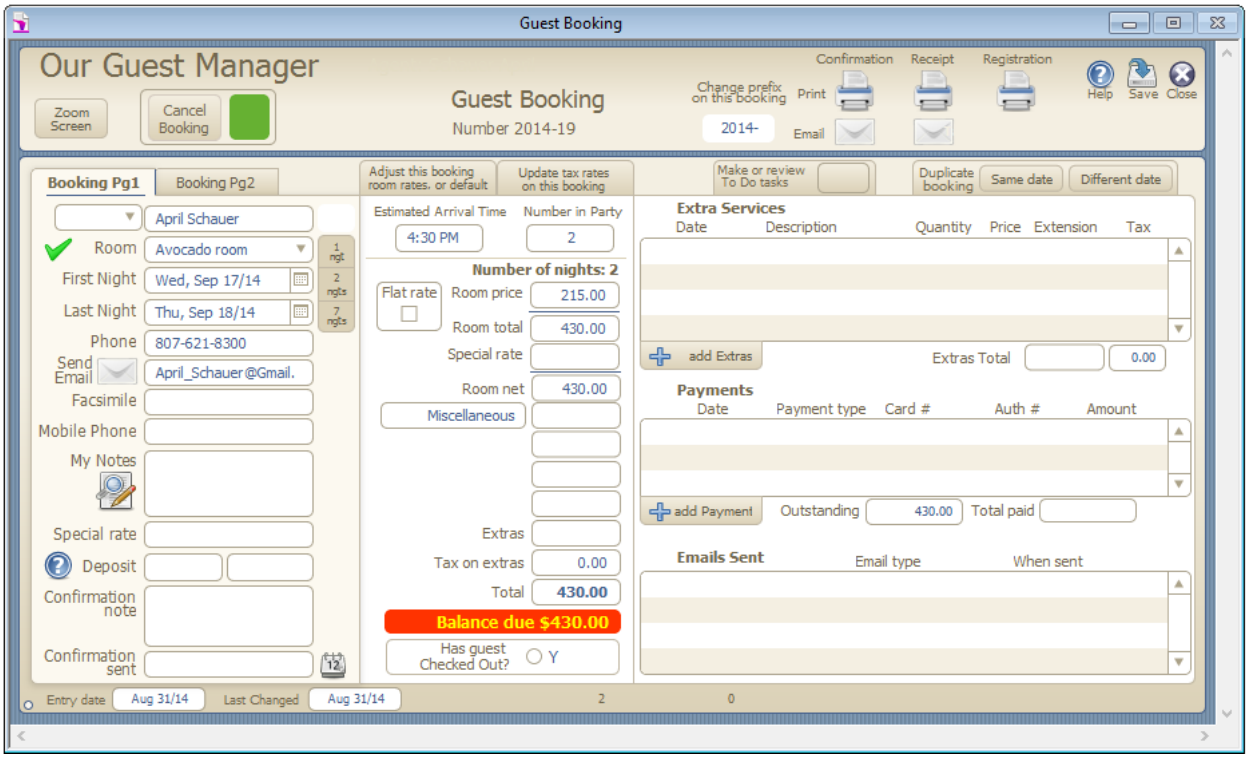


The system set-up section is the place to start when first installing Our Guest Manager. These sections allow you to customize Our Guest Manager for your business. Full descriptions of these screens are explained in detail later in the manual. Here is a list of the customizable features:

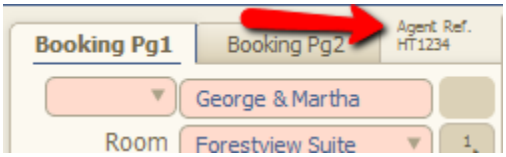
- ✓ Company contact information with web map URL field and signature panel
- ✓ Up to 8 accommodation entries with name, description, amenities, prices, location and bed configuration
- ✓ Unlimited discount/premium special pricing entries

- ✓ Unlimited chargeable "extras" that you may offer, such as theatre tickets, golf, etc.
- ✓ Two variable and one fixed tax fields with choice of calculation type
- ✓ Common wording for confirmations and receipts, up to 9 payment types accepted, custom currency symbol
- ✓ Cancellation policy, breakfast times, earliest check-in, latest check-out, deposit requirements
- ✓ Association memberships
- ✓ Login page web access addresses for modifiable search engines and booking agents
- ✓ Default screen zoom settings, email settings, choice of plain paper or letterhead printing for receipts and confirmations, data export choices, business logo insert
- ✓ Choose to show tooltips or not
- ✓ Settings for iPhone/iPad/iPod Touch connectivity
- ✓ Store company logo graphic
- ✓ Test SMTP email settings for popular email systems such as Gmail.

The reservation screen

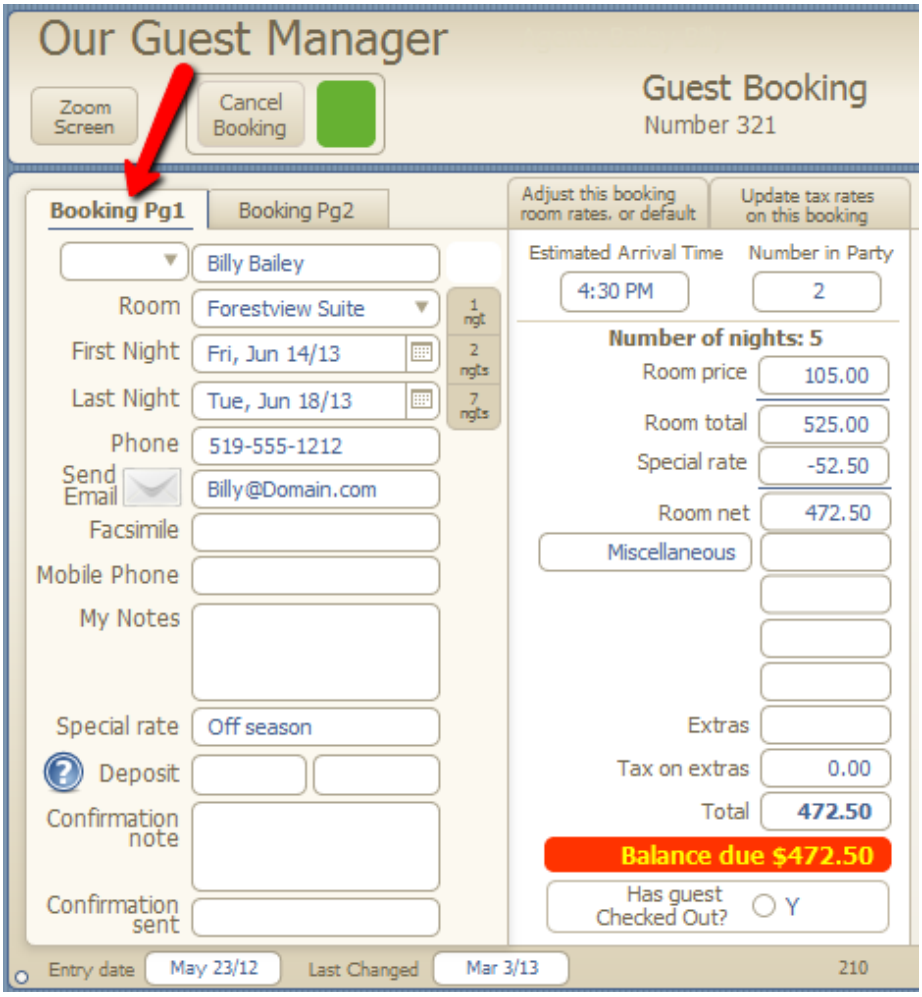


Bookings by Agents show the agent supplied reference number and background colour of fields change colour as a visual cue that booking is an agent customer.



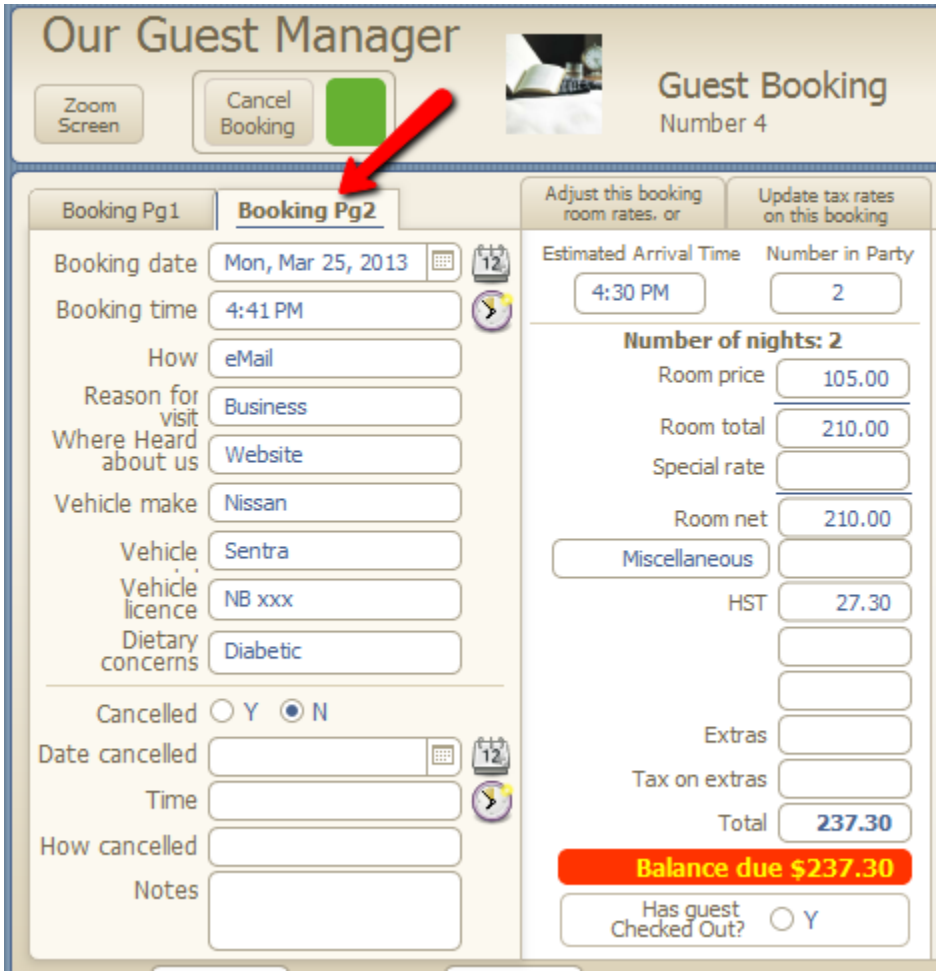
The Reservation screen is created by clicking on the 'Create new booking' button on the customer screen. This screen includes –

On the Booking Pg1 tab -



- ✓ Contact information
- ✓ Room booked
- ✓ Dates of stay
- ✓ Estimated time of arrival
- ✓ Pricing including taxes, discount/premium special pricing
- ✓ Overriding deposit amount and date

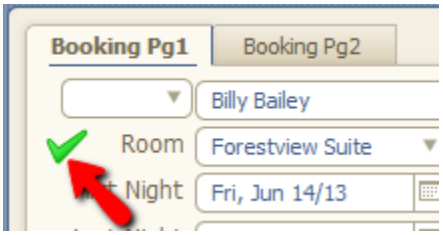
On the Booking Pg2 tab -



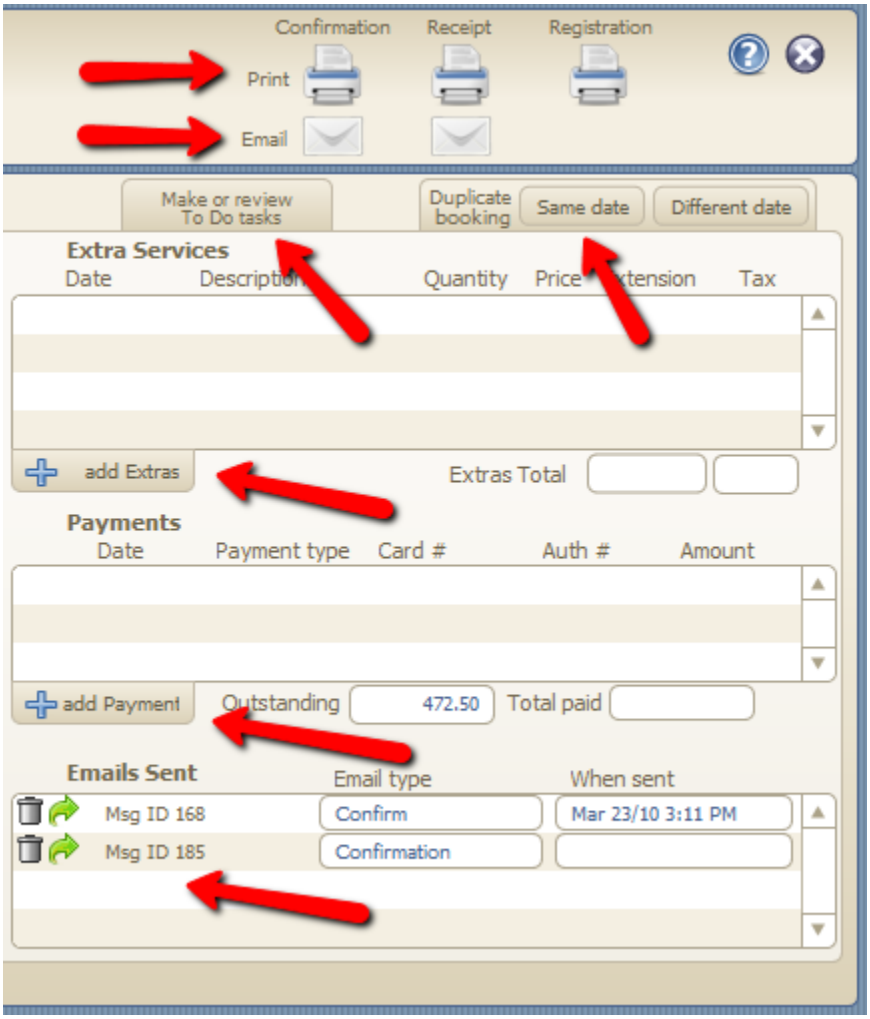
- ✓ Booking date, time and booking method
- ✓ Reason for visit and marketing source
- ✓ Vehicle details
- ✓ Dietary concerns
- ✓ Cancellation information

From this screen you can also –

- ✓ Quick cancel the booking
- ✓ Adjust the room rate on the booking or change the default rates
- ✓ Update tax calculations if tax schema has changed since the booking



Added in release v2.01.7 is the ability to check room availability based on the entered dates on the booking.

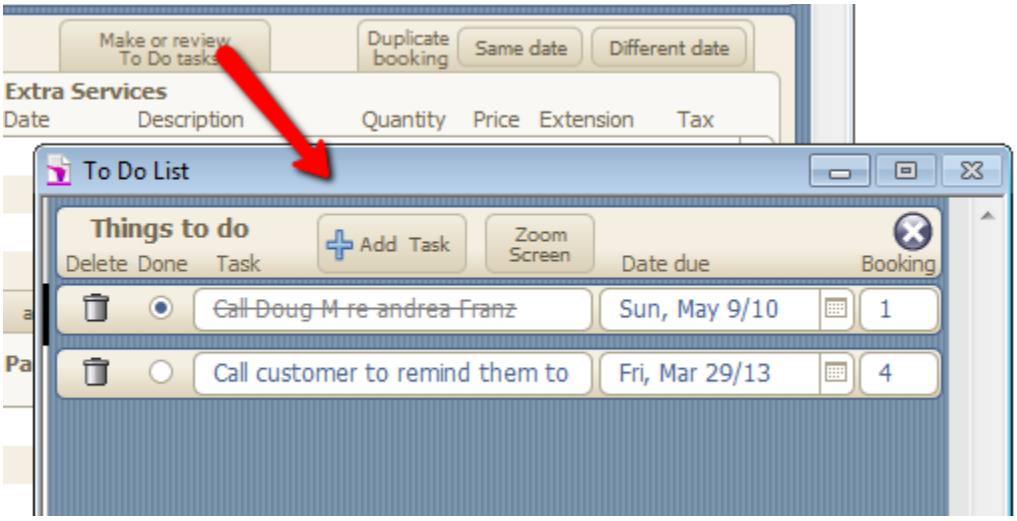


From the right side of the booking screen you can –

- ✓ Create printed or emailed booking confirmation
- ✓ Create a guest registration form
- ✓ Create printed or emailed receipt
- ✓ Create a To Do task item
- ✓ Duplicate the booking with different room or dates

- ✓ Record 'Extras' purchased
- ✓ Record payments on the booking
- ✓ Access emails sent

The 'to do' screen



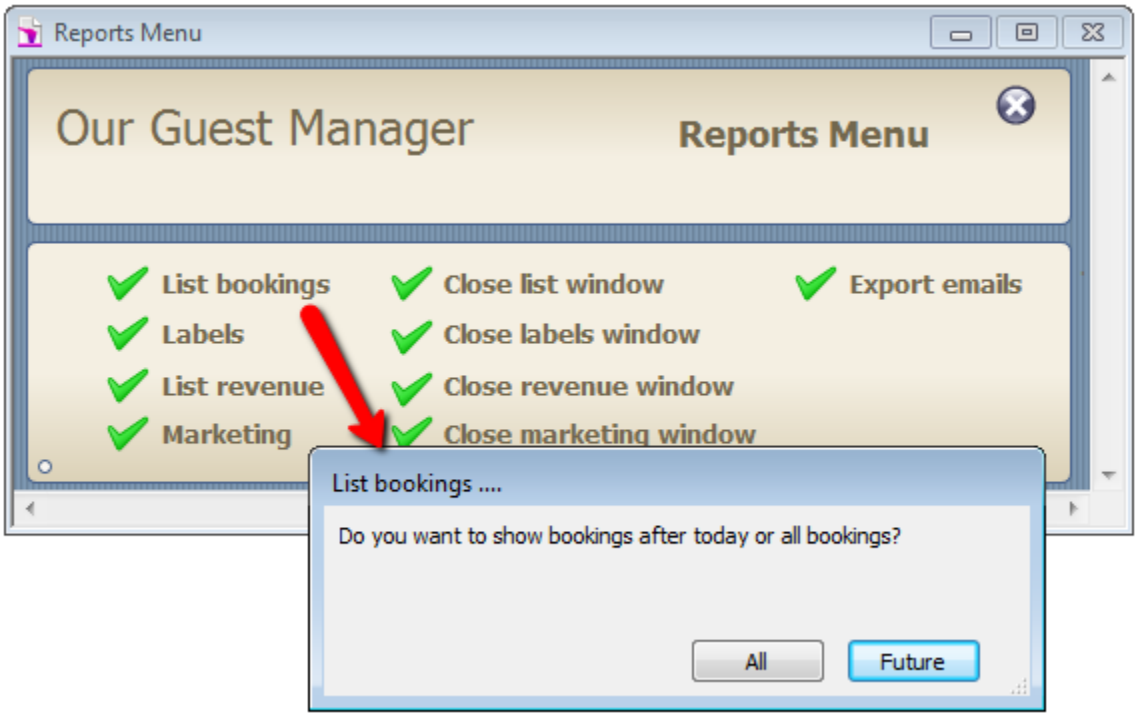
- ✓ A 'quick and dirty' place to enter reminders of things that you need to do

NOTE: The first time you open Our Guest Manager each day, tasks past due and due within the next 7 days, and not marked 'done', will be presented.

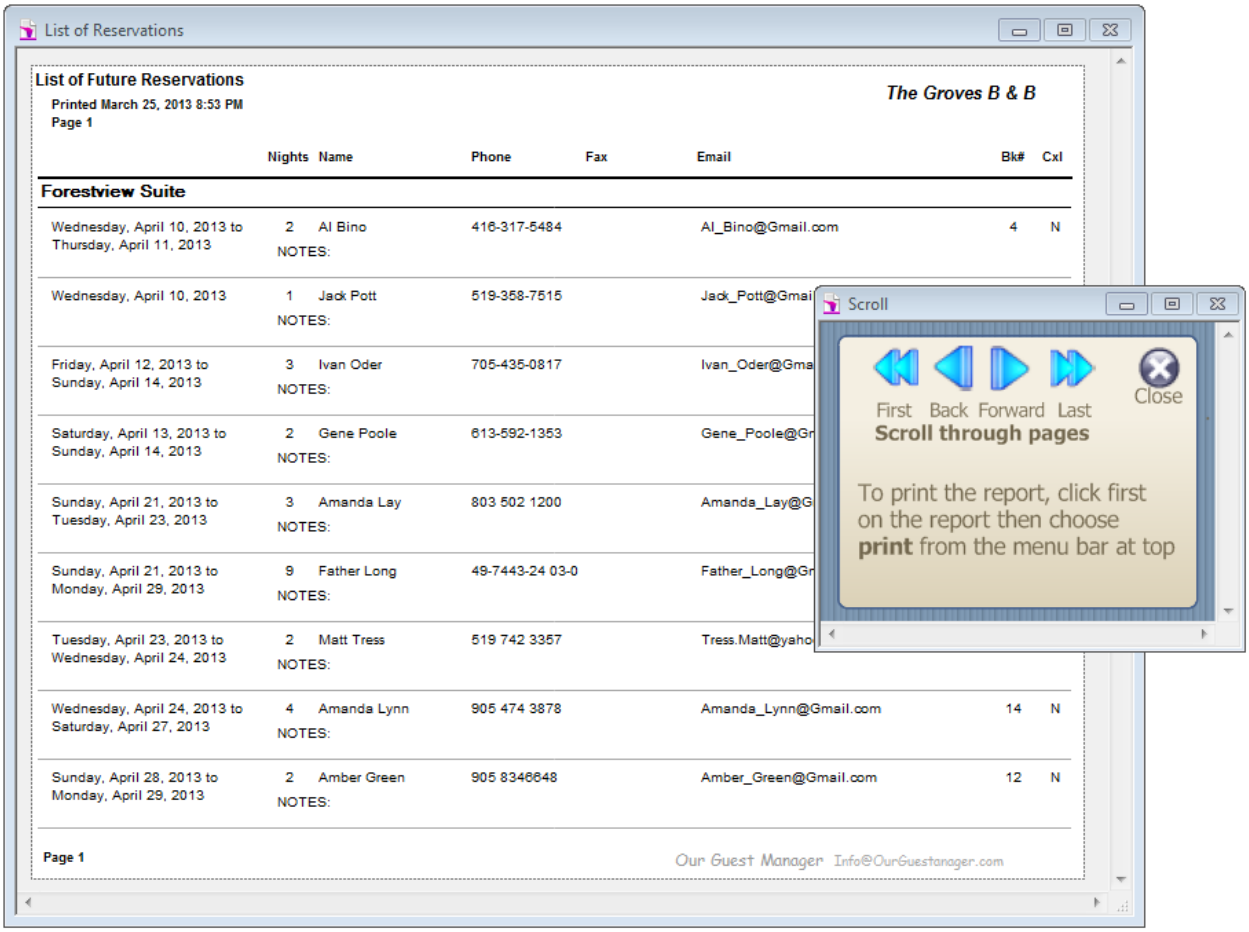
Review bookings

Listing bookings

From the Reports Menu, a list of bookings can be created.

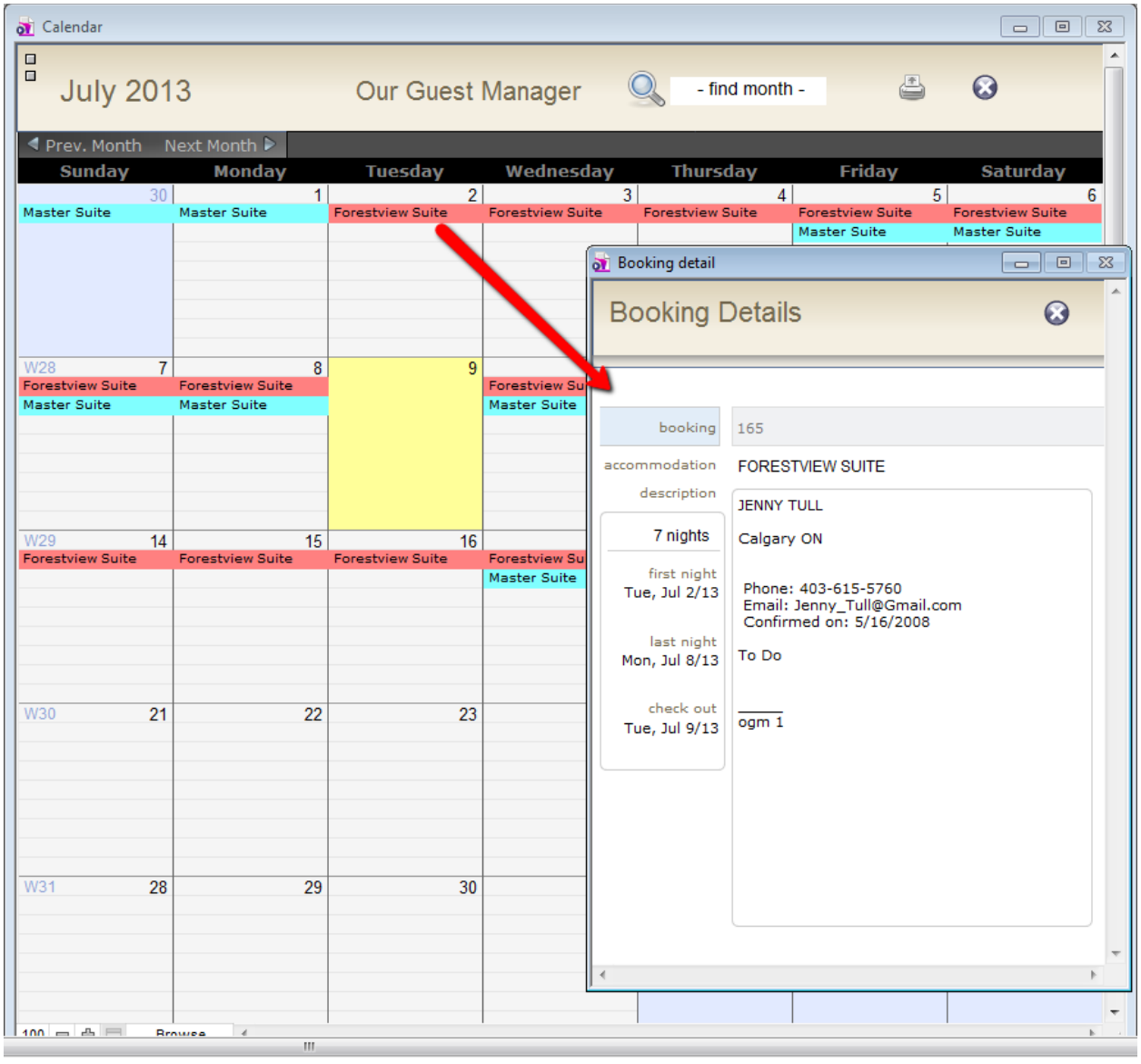


NOTE: you may also limit the report to show only one specific room.


List of Reservations
List of Future Reservations
Printed March 25, 2013 8:53 PM
Page 1
The Groves B & B
Nights Name Phone Fax Email Bk# Cxl
Forestview Suite
Wednesday, April 10, 2013 to Thursday, April 11, 2013 2 Al Bino 416-317-5484 Al_Bino@Gmail.com 4 N
NOTES:
Wednesday, April 10, 2013 1 Jack Pott 519-358-7515 Jack_Pott@Gmai
NOTES:
Friday, April 12, 2013 to Sunday, April 14, 2013 3 Ivan Oder 705-435-0817 Ivan_Oder@Gma
NOTES:
Saturday, April 13, 2013 to Sunday, April 14, 2013 2 Gene Poole 613-592-1353 Gene_Poole@Gr
NOTES:
Sunday, April 21, 2013 to Tuesday, April 23, 2013 3 Amanda Lay 803 502 1200 Amanda_Lay@G
NOTES:
Sunday, April 21, 2013 to Monday, April 29, 2013 9 Father Long 49-7443-24 03-0 Father_Long@Gr
NOTES:
Tuesday, April 23, 2013 to Wednesday, April 24, 2013 2 Matt Tress 519 742 3357 Tress.Matt@yaho
NOTES:
Wednesday, April 24, 2013 to Saturday, April 27, 2013 4 Amanda Lynn 905 474 3878 Amanda_Lynn@Gmail.com 14 N
NOTES:
Sunday, April 28, 2013 to Monday, April 29, 2013 2 Amber Green 905 8346648 Amber_Green@Gmail.com 12 N
NOTES:
Page 1
Our Guest Manager Info@OurGuestanager.com
Scroll
First Back Forward Last
Close
Scroll through pages
To print the report, click first on the report then choose print from the menu bar at top

Calendar View of bookings

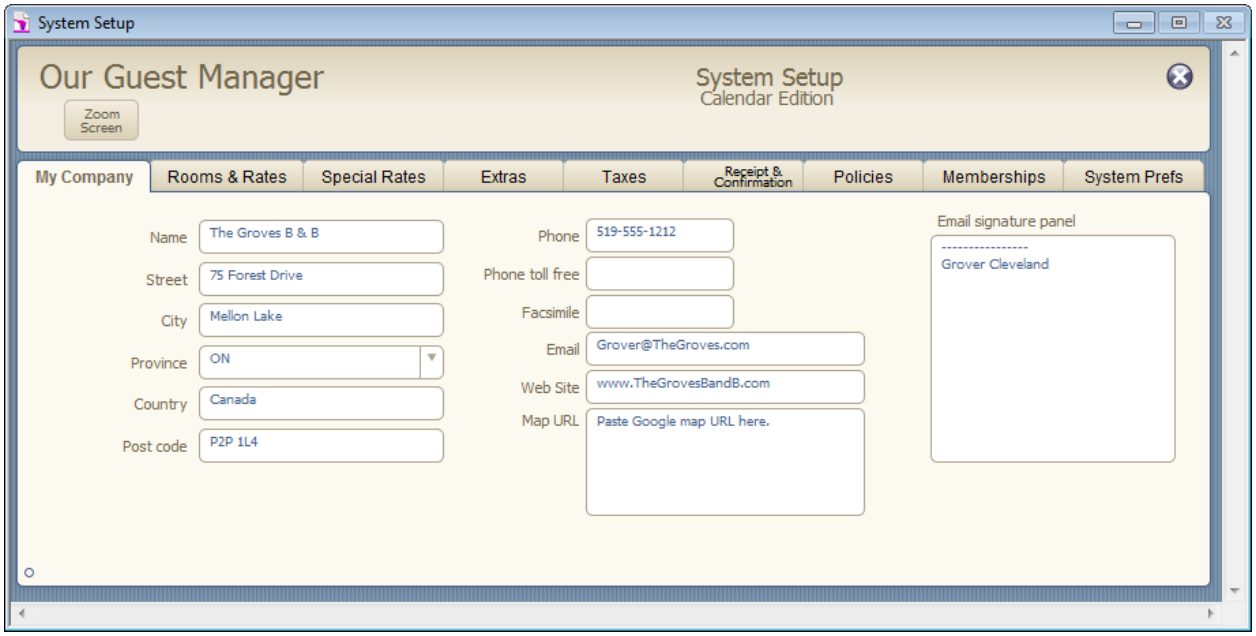
Our Guest Manager includes the ability to view bookings in a calendar view from the button on the Customer page.



The Details

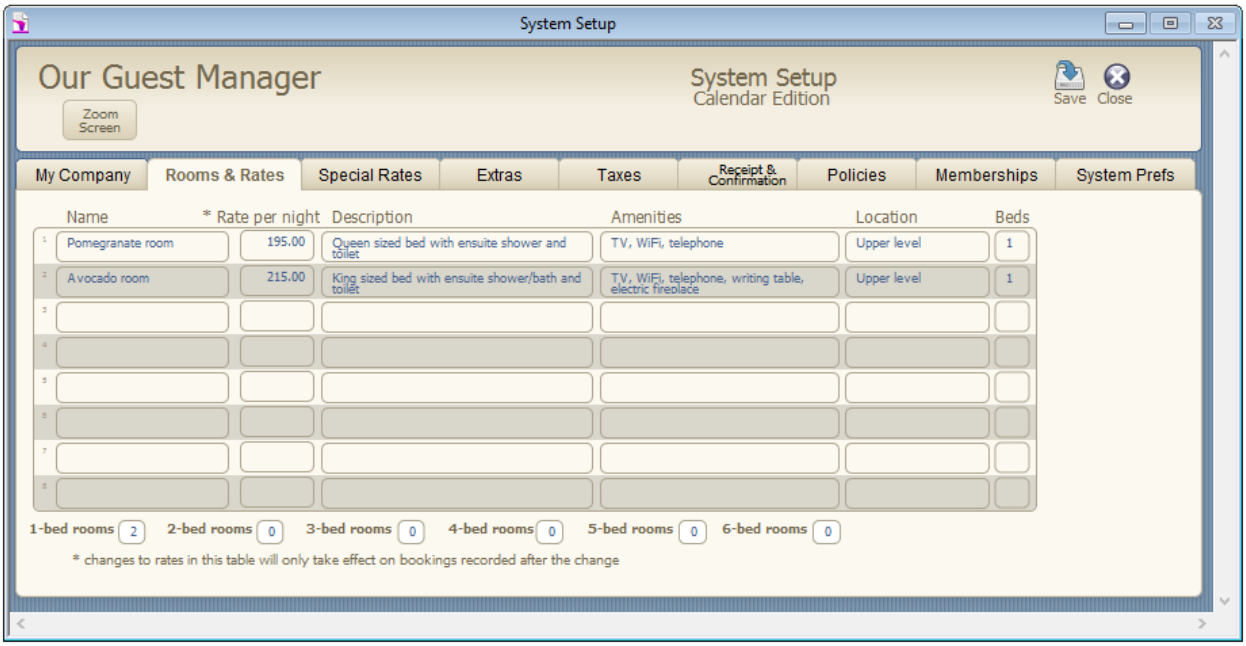
System Preferences and Set-up

Company set-up



Everything on this screen appears on the printed and emailed booking confirmations and receipts.

Rooms and Rates



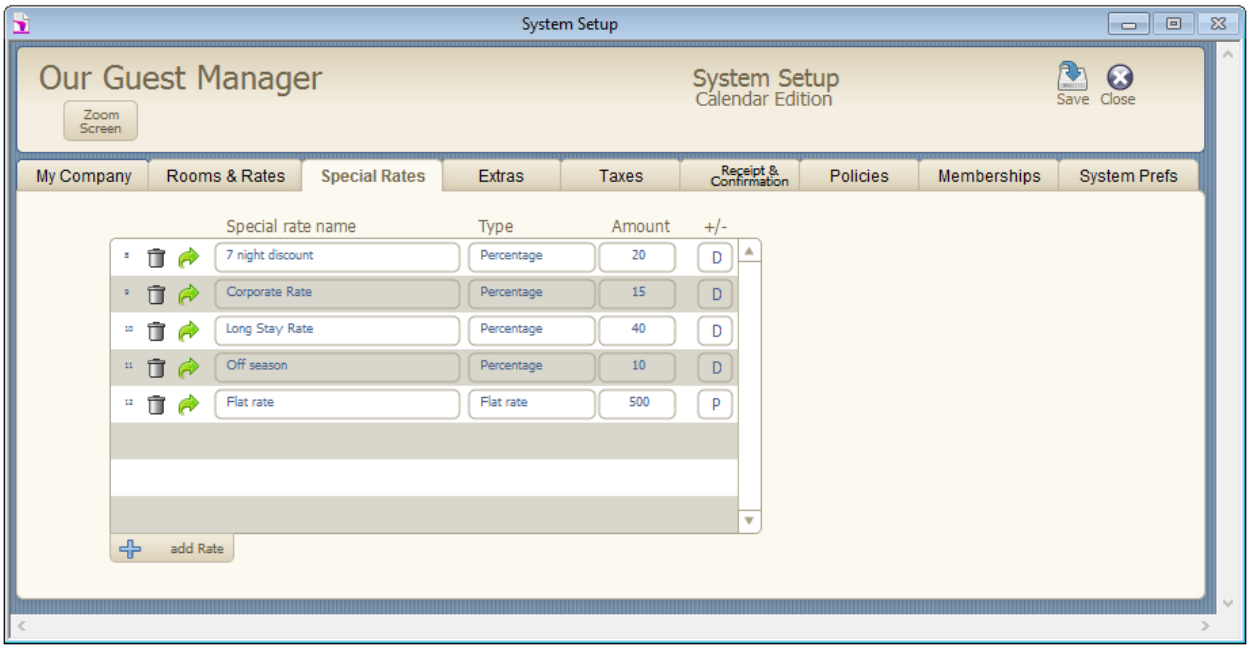
Our Guest Manager is designed for Bed and Breakfasts with eight units or less.

Enter the default values for –

- ✓ The name of the room, suite, cottage, etc
- ✓ The normal rate per night
- ✓ A description of the room
- ✓ Amenities in the room
- ✓ Location of the room
- ✓ Number and type of beds, e.g. 1Q, 1K, 2D, 1Q + cot

NOTE: as reservations are entered into the booking system, these default values are *pulled* onto the booking. Changes in this table are only reflected on bookings entered after the change. You do have the ability to update the booking rates on a reservation by reservation basis.

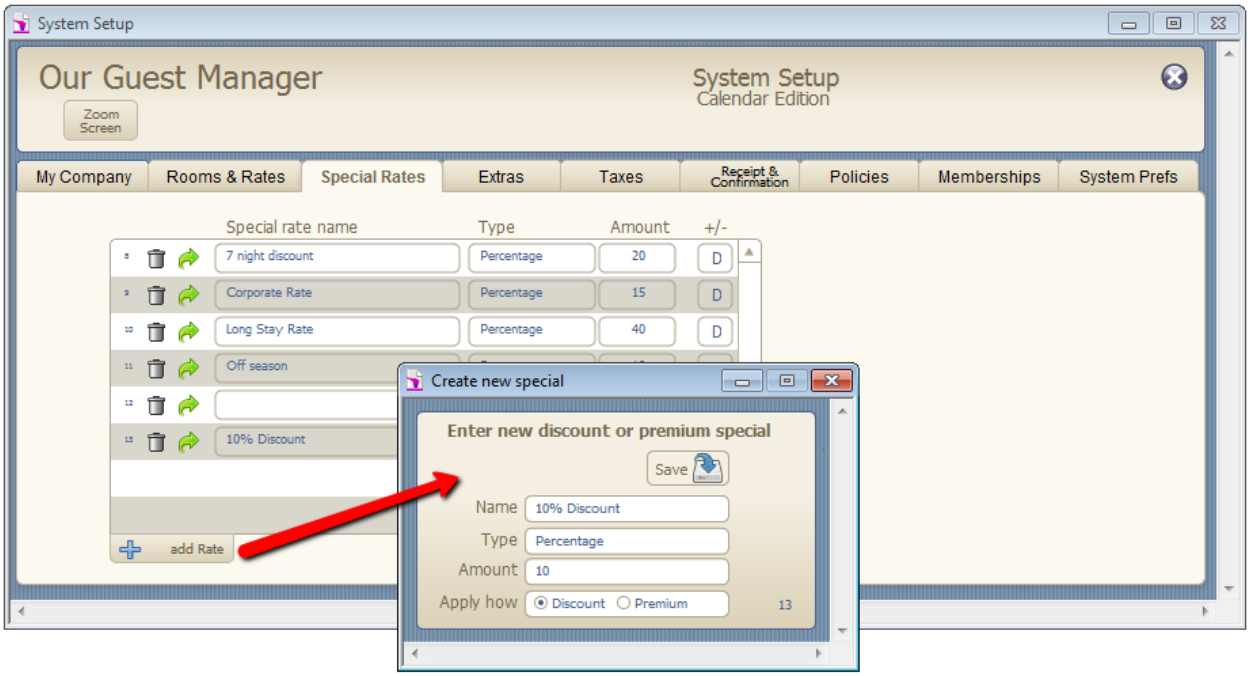
Special Rates



Enter into this screen an unlimited number of 'special occasion' situations.

They can be entered as flat rate or percentage, premium or discount.

Click on 'Add New' to open a window for entering the new special rate.

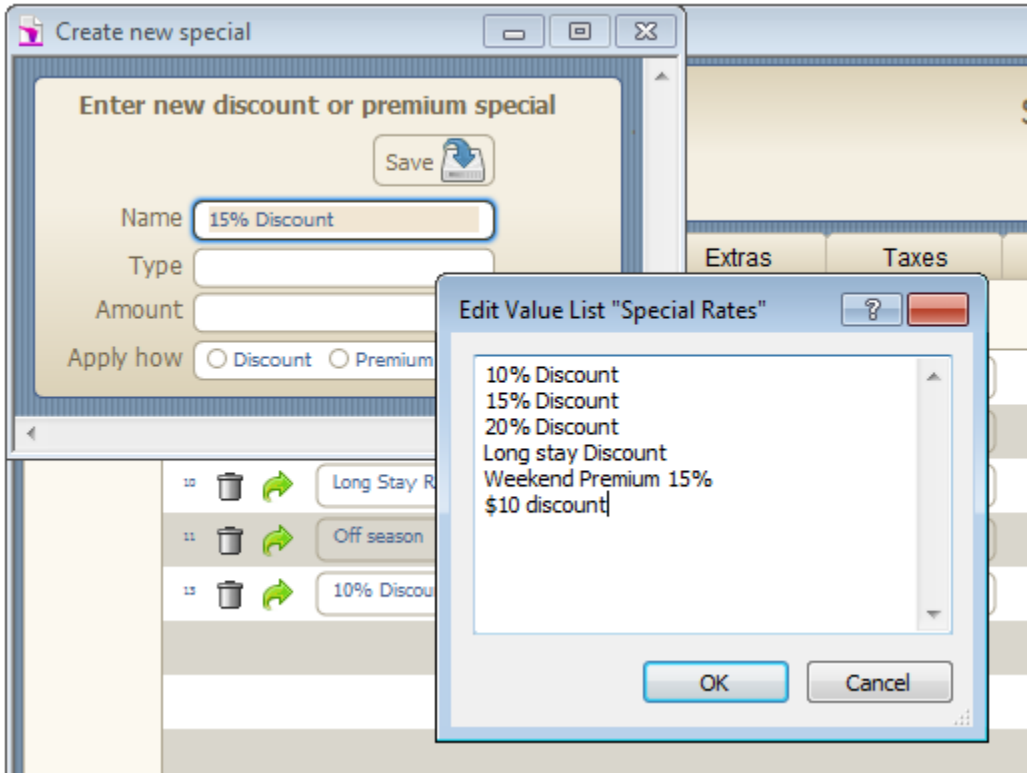


- ✓ Name — Give the occasion a meaningful name. You will be presented with a drop-down menu of previously entered items. This list may be edited or added to.
- ✓ Type — You will be presented with 'Flat Rate' or Percentage
- ✓ Amount — The amount entered is applied depending on type and whether a Discount or Premium selected below. Always enter a positive number

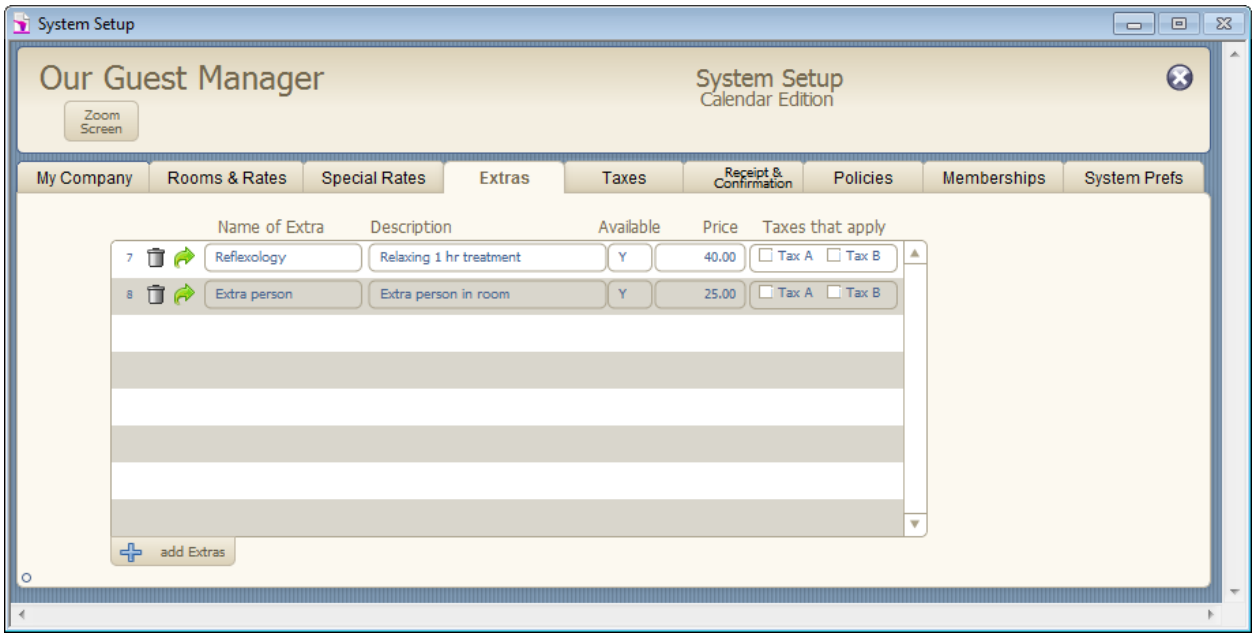
e.g. A flat rate $10 discount applied to a $105.00 per night room for a 3-night stay would show a discount of $10.00 off the total bill: $105 x 3 = $315 - $10 = $305.00

e.g. A 10% discount would be calculated as: $105 x 3 = $315 - $31.50 = $283.50.

Click *Save* to create the special rate. These can be edited and deleted by using the buttons to the left of the name.

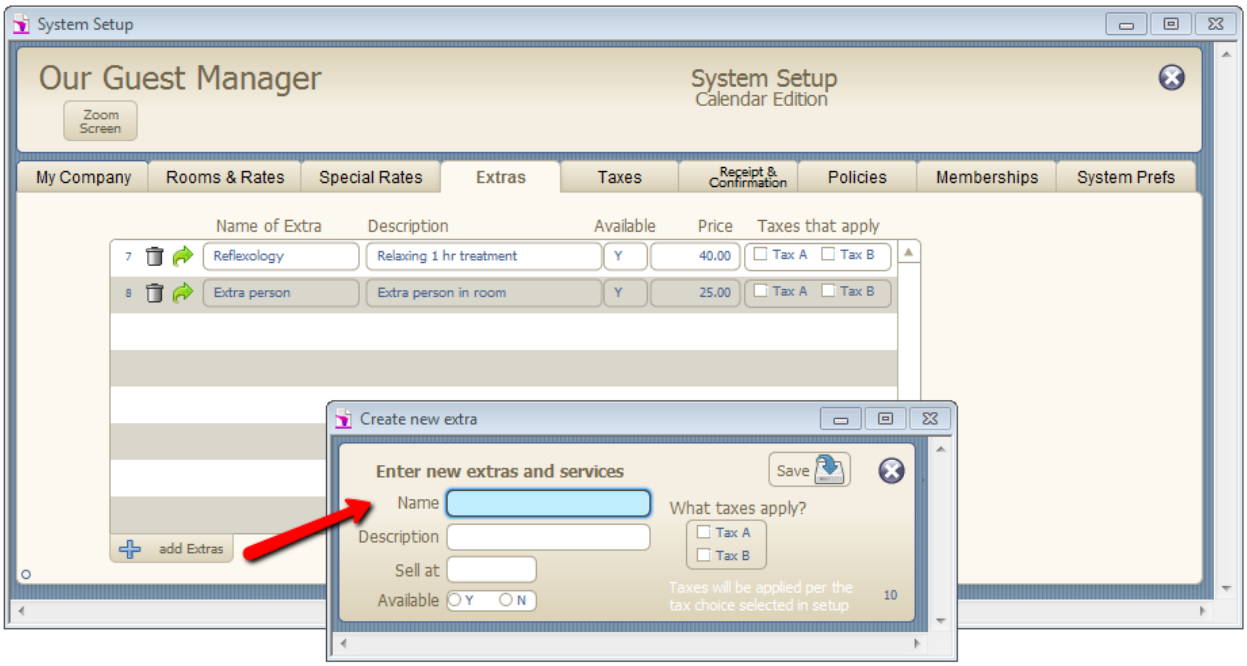


Extras



Enter into this screen an unlimited number of 'Extras' that you might want to sell as an added value.

Click on 'Add Extras' to open a window to add an 'Extra'.

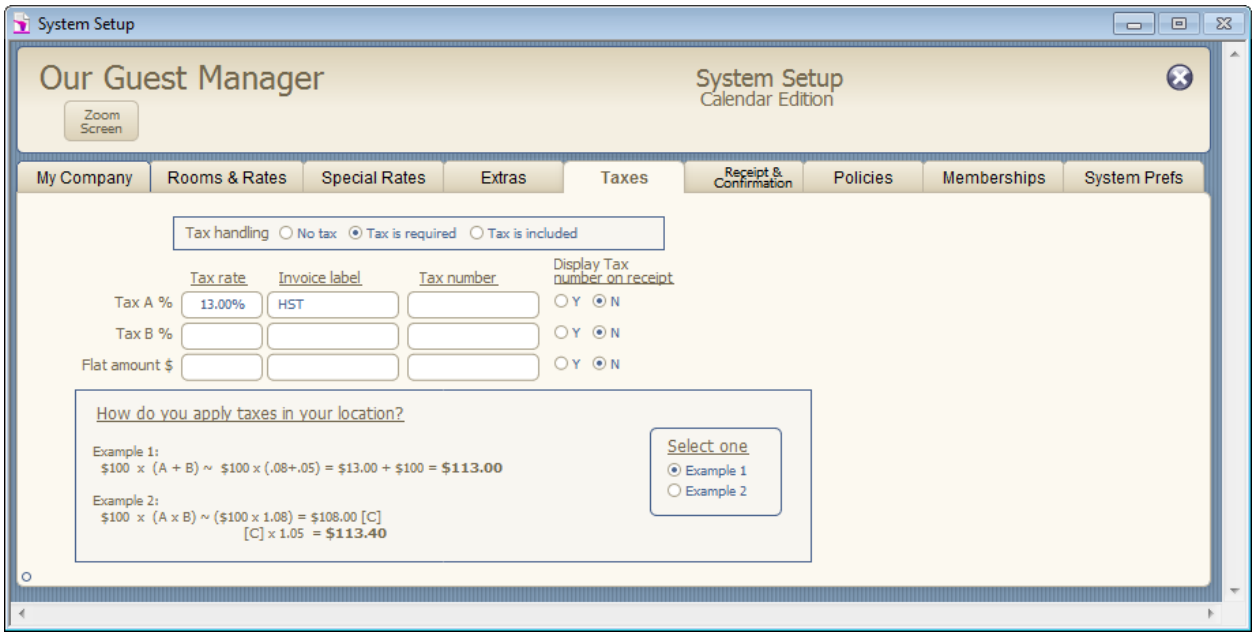


✓	Name	Give the extra a meaningful name. This will appear on the receipt
✓	Description	A short description that will appear on the receipt, e.g. 9 holes At Glen Abbey
✓	Sell at	The amount, before taxes, that you wish to charge
✓	Available	Items marked 'Y' will be available to add to the reservation
✓	Taxes	You may add Tax A, Tax B, or both as defined in the next section

Click *Save* to close the addition window.

Handling Taxes

There are many ways that taxes can be applied which vary depending on your location.



Our Guest Manager gives you the option of choosing -

- No tax
- Tax is required
- Tax is included

Depending on the choice made, the wording on the confirmations and receipts will change.

If tax is required to be added to prices, the program has three tax fields which may or may not require values.

Each of tax field A and B is standalone but can be added together.

For instance, B&Bs in Canadian provinces that have Harmonized Sales Tax, such as Nova Scotia, New Brunswick, etc., may only need to use Tax Field A for the total tax rate. The label then would have to be changed to HST from the sample data entered into the system at time of downloading.

Jurisdictions such as Québec, that compounds the tax (tax on tax), would use both Tax A and Tax B fields.

How the tax is applied is determined by whether you choose Example 1 or Example 2.

Example 1 simply adds the two rates together: 10% + 5% becomes 15% which multiples the total room amount.

Example 2 adds tax to the tax so that result is slightly higher tax.

Tax example one

Mr. and Mrs. Smith book a room for 5 nights at a rate of $100 per night

5 x $100 = $500.00

15% tax = 75.00

Total due = $575.00

Tax example two

Mr. and Mrs Smith book a room for 5 nights at a rate of $100 per night

5 nights x $100	=	$500.00
10% tax	=	50.00
		$550.00
5% tax	=	27.50
Total due	=	$577.50

Contact your local provincial offices to determine how tax is applied where you are.

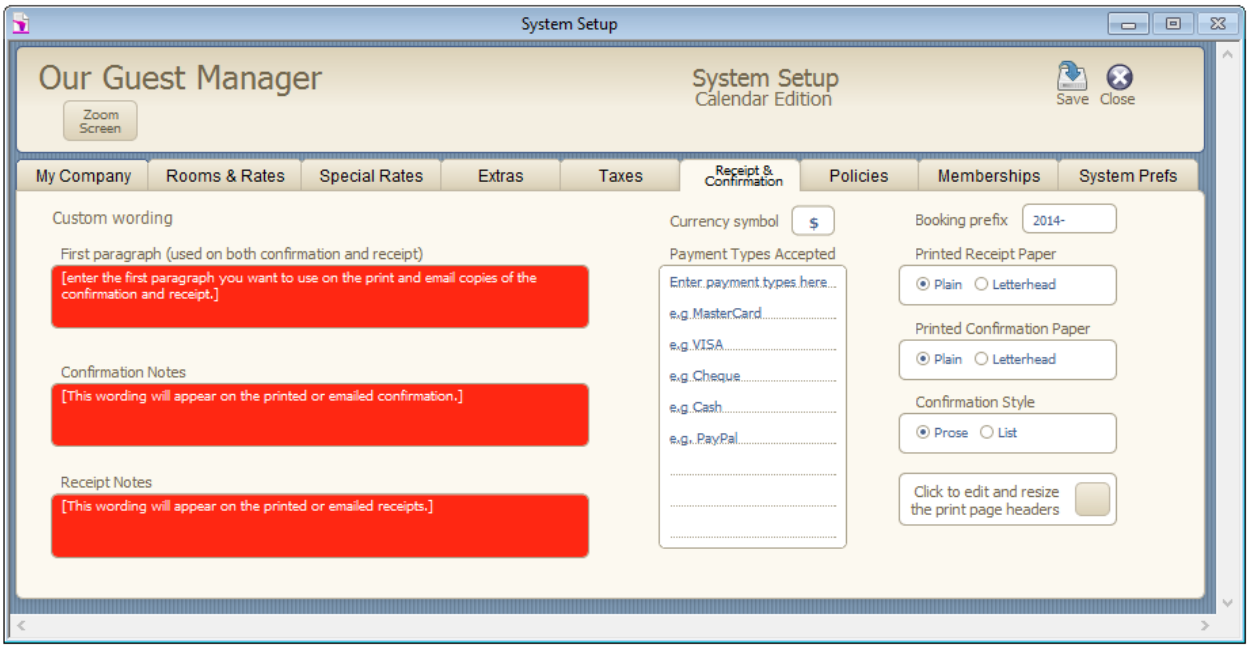
NOTE: Our Guest Manager assumes no responsibility for incorrect tax calculations.

The third tax field is a flat amount tax, such as a city room tax, of say $3.00 per stay.

NOTE: If the three tax fields do not meet with how taxes are applied in your area, you have flexibility of using the 'Extras' section for taxes.

The tax labels may be changed to meet the requirements of your jurisdiction. Also, enter your tax numbers into the fields provided and decide if you want the tax labels to show on your receipt or not.

Reservation Confirmations & Receipts



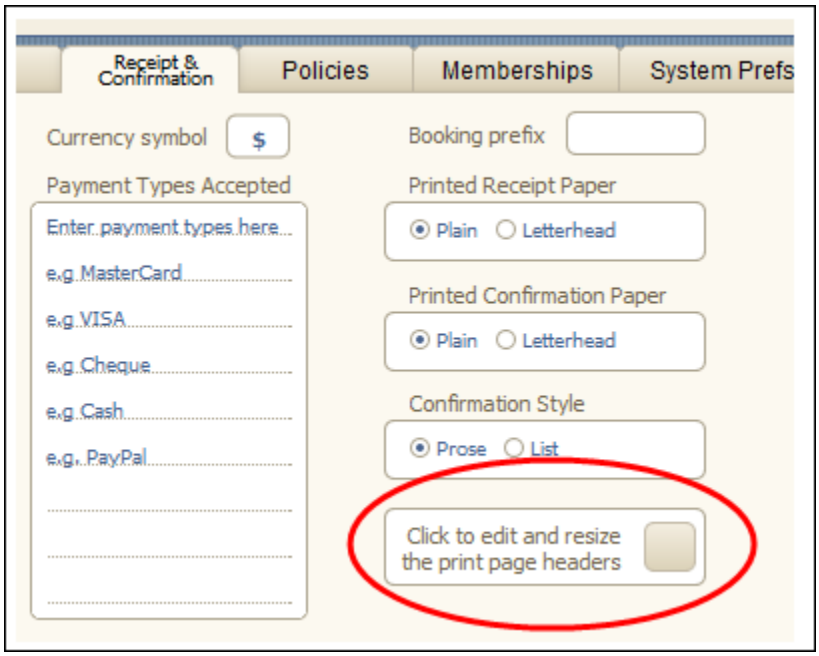
Entries In this section are all included in your printed or emailed booking confirmations and receipts.

Enter custom wording for the first paragraph to appear on the confirmation and receipt by default.

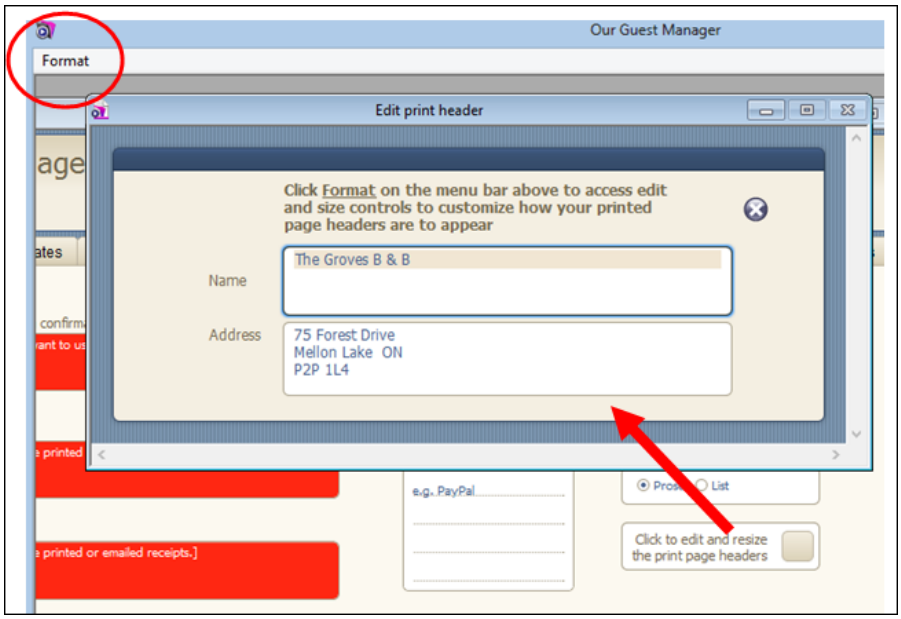
Enter custom wording for notes that you want to appear on every confirmation and every receipt, enter a default currency symbol, list the payment methods that you will accept and choose whether you are printing on plain paper or pre-printed letterhead. If the former, your company name, address and logo as entered in the Company Set-up section will be printed. The latter assumes that you are using letterhead printed in the top 1-$^{3}/_{4}$" (4.5 cm) of North American standard 8.5 x 11 inch paper, printed in portrait mode.

Set your preference for prose based or list based printed and emailed booking confirmations.

If you wish to customize the font size and colour for printed confirmation and receipts, you can make the change from this set-up page as well.



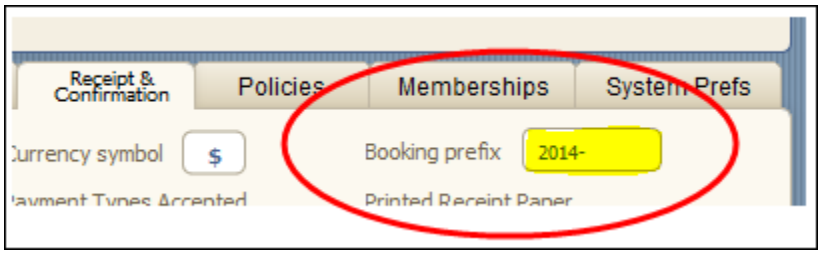
Clicking in the indicated area will open a new window to allow editing.


Our Guest Manager
Format
Edit print header
Click Format on the menu bar above to access edit and size controls to customize how your printed page headers are to appear
Name
The Groves B & B
Address
75 Forest Drive
Mellon Lake ON
P2P 1L4
e.g. PayPal
List
Click to edit and resize the print page headers

To edit the text fields, first click into the field then use the drop-down Format control from the menu bar to make your changes.

NOTE: The fonts available on the list are those which are installed on your computer. You may add more fonts as needed.

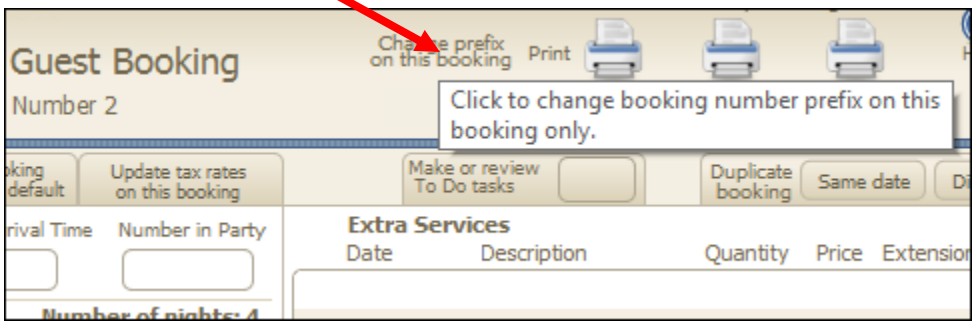
If you wish to use a custom Prefix number in front of the automatically generated booking numbers, you set up the default on the Receipt & Confirmation page.



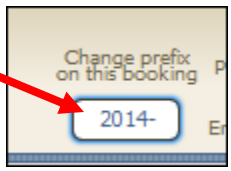
If you create a new booking, say number 235, it will appear as *2014-235* on the confirmation and receipts.

You may change the prefix on a booking by booking basis on the booking page.

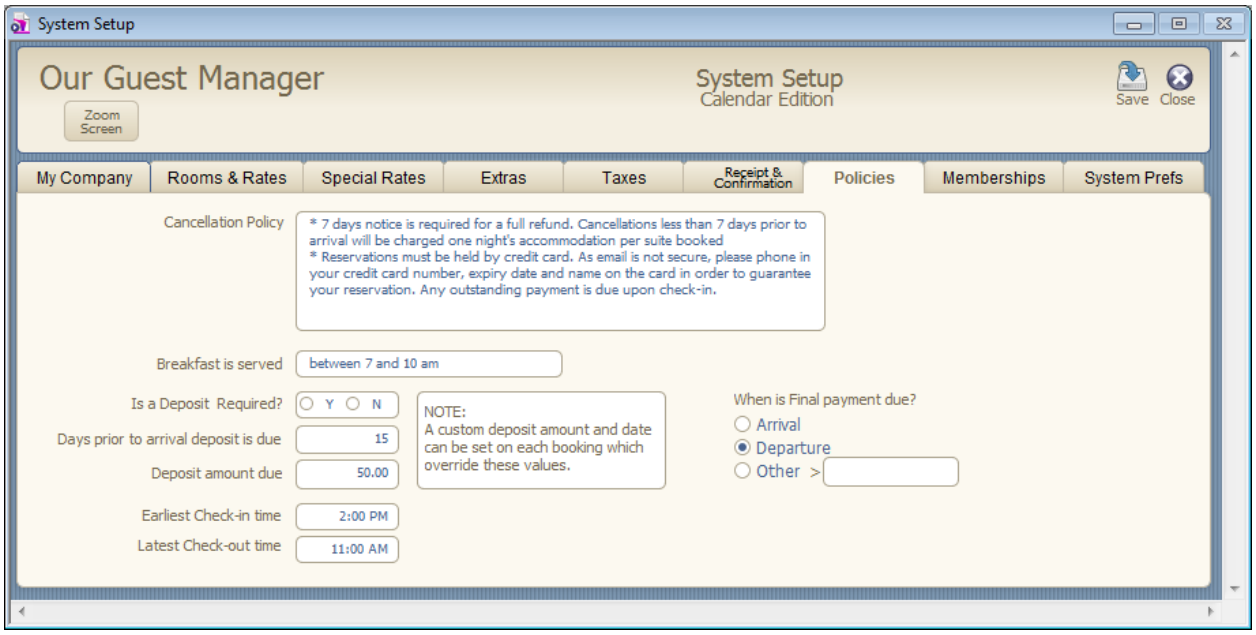
Click here



Add your prefix



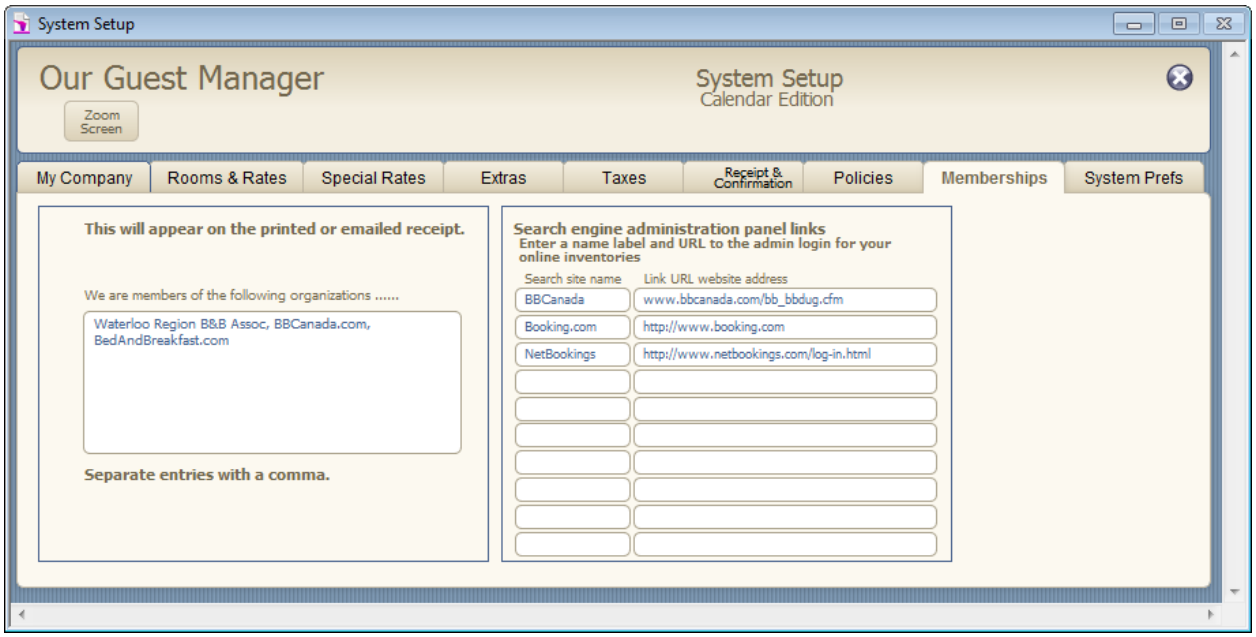
Policies


System Setup
Our Guest Manager
Zoom Screen
System Setup
Calendar Edition
Save
Close
My Company
Rooms & Rates
Special Rates
Extras
Taxes
Receipt & Confirmation
Policies
Memberships
System Prefs
Cancellation Policy
* 7 days notice is required for a full refund. Cancellations less than 7 days prior to arrival will be charged one night's accommodation per suite booked
* Reservations must be held by credit card. As email is not secure, please phone in your credit card number, expiry date and name on the card in order to guarantee your reservation. Any outstanding payment is due upon check-in.
Breakfast is served
between 7 and 10 am
Is a Deposit Required?
Y
N
Days prior to arrival deposit is due
15
Deposit amount due
50.00
NOTE:
A custom deposit amount and date can be set on each booking which override these values.
When is Final payment due?
Arrival
Departure
Other >
Earliest Check-in time
2:00 PM
Latest Check-out time
11:00 AM

Enter your -

- ✓ cancellation policy as you wish it to appear on your booking confirmation. Edit the verbage to fit within the box on a sample printed confirmation.
- ✓ times at which breakfast is served (this completes the sentence on your confirmation that reads "Breakfast is served {field value}.")
- ✓ enter whether a deposit is required or not, when it's required and how much. These values may be overridden by entries on the individual bookings as required
- ✓ enter earliest check-in time on day of arrival and latest check-out time on day of departure
- ✓ enter when final payments are due – upon Arrival, Departure or Other.

Memberships and Associations



Printed and emailed confirmations include what professional memberships you hold.

Enter them with a comma between them. e.g. Association One, Group Two, Association Three.

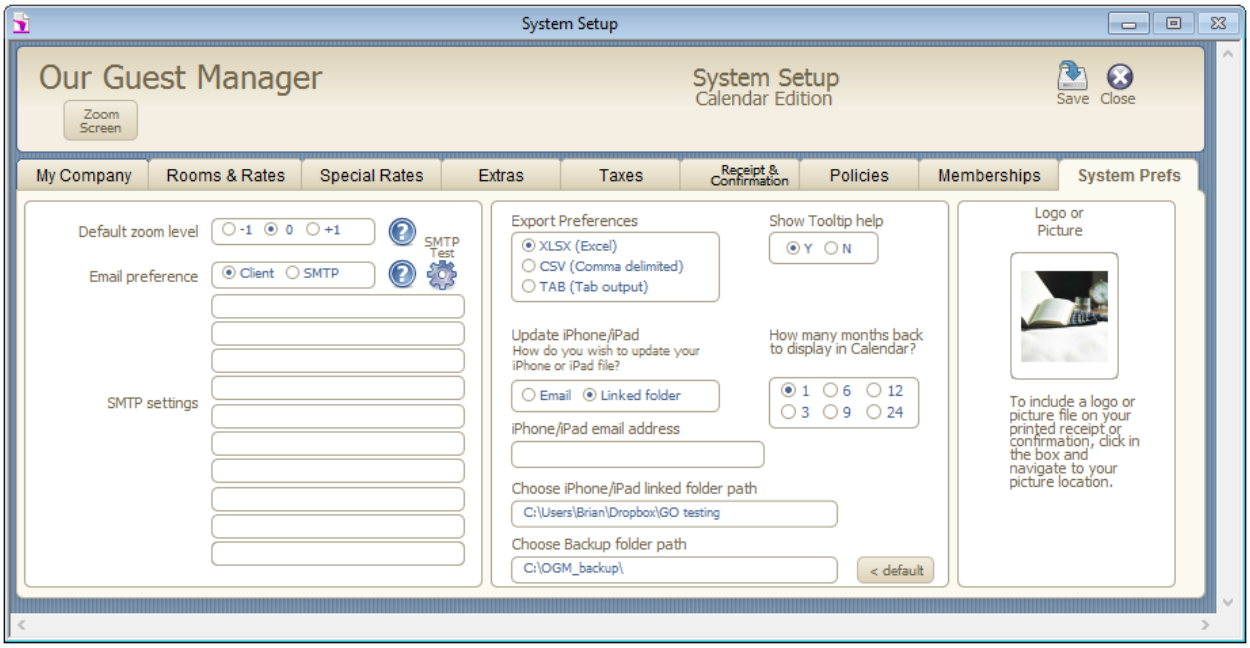
Search Engine Administration Window

Guest Manager includes the ability to access your various accommodation search engines from the built-in web viewer, when connected to the internet.

The web address of the site and label for up to 10 sites may be entered into the screen above.

Access to the sites is by clicking on the Update Web Inventories button on the main customer page, bringing up the interactive web viewer –

System Preferences and Email set-up



You may set the default screen zoom level for all screens if you find the start screen too big or too small for your computer screen.

You have the ability to export all data entered into the system for the following data tables – customers, reservations, extras purchased, payments entered, emails sent.

Choose in which format you would like to export this data: in Microsoft Excel (.XLSX) format, text based comma delimited (.CVS) format, to tab delimited (.TAB) format.

Our Guest Manager allows you to choose to send email out through your default email program (called clients) or to send mail through an SMTP server such as Gmail.com, Yahoo.com, Mail.com, Authsmtp.com or other email system, such as your own B&B website if your hosting agreement includes email.

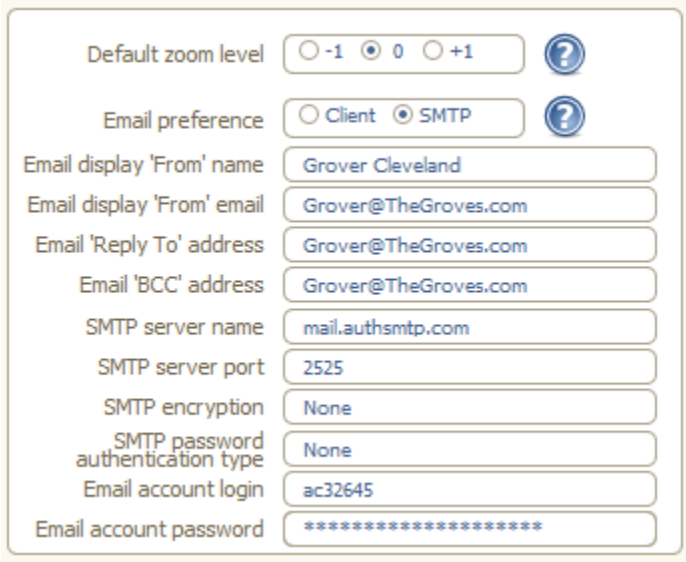
Earlier versions of Windows came with Outlook Express installed that could be configured as an email client program. Other examples are Outlook as part of MS Office, or the free feature-rich email client is Mozilla Thunderbird.

Some web based email (Gmail.com, Hotmail.com/Outlook.com/Windows Live/Yahoo) may have utilities that will set them as your default mail program. Check with those program help files for details.

Using website mail servers

Sites with outgoing SMTP (Simple Mail Transfer Protocol) servers, such Gmail.com, Mail.com, Yahoo.ca and your own website server, can be used to send messages from Our Guest Manager without using an additional email program.

The SMTP server set-up is available in Our Guest Manager.



Our Guest Manager will use whichever method is selected as your email preference –

- *Client* uses a secondary program, your default email program such as Outlook, to send your emails generated from Our Guest Manager.
- *SMTP* uses the mail server specified to send email without requiring a secondary program

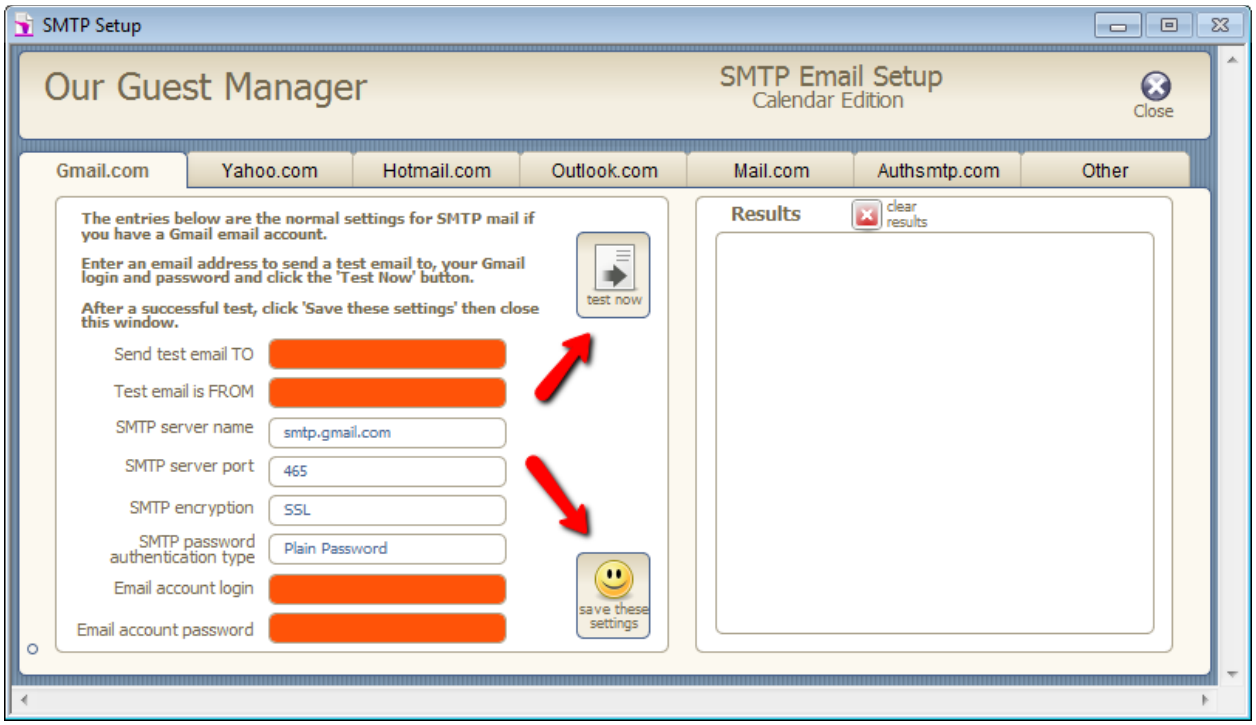
NOTE: Look for SMTP settings in the Appendix section of this manual.

SMTP testing.

For some, setting up Our Guest Manager to use an SMTP (Simple Mail Transfer Protocol) mail system may be a daunting task.

However, Our Guest Manager has a built-in testing module to make sure your settings work before they are set for use in the program.

Select SMTP as your mail service and then click on the 'SMTP test' gear icon to open the testing module.



There are tabs for popular mail systems:

- ✓ Gmail.com
- ✓ Yahoo.com and .ca
- ✓ Hotmail.com
- ✓ Outlook.com
- ✓ Mail.com
- ✓ Authsmtp.com

Pressing each of these tabs will populate the server, port, encryption fields with the values from the various websites. These have all been tested.

The 'Other' tab allows manual entry of these fields with, say, settings from your own website domain host.

There are also buttons for

- ✓ Bellaliant
- ✓ Rogers
- ✓ Shaw
- ✓ Sympatico
- ✓ Telus

The values have been gleaned from the various help files from these communications companies, however these settings have not been tested.

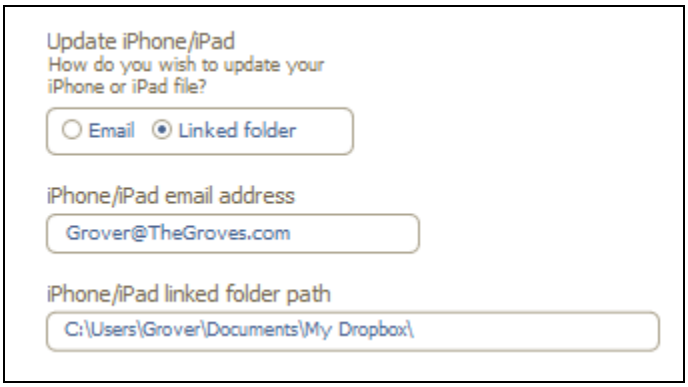
Enter a TO: email address, a FROM: email address, your account login and password (in the fields with red backgrounds), then press the 'test now' button. If successful, a confirmation will show up in the Results box. If not-successful, the Results box will show what errors occurred.

After a successful test, click on 'save these settings' to copy the settings to the preferences panel on the setup page.

Setting up transfer of data to iPhone, iPad and iPod Touch.

Our Guest Manager gives you the ability of transferring your customer base and future bookings to your Apple iOS device equipped with the FileMaker GO App which is available on iTunes [link].

Although not a live link, the Our Guest Manager iPhone module allows you to review vacancies and enter bookings received while you are away from the B&B. You also can send a quick confirmation acknowledging the booking by email.

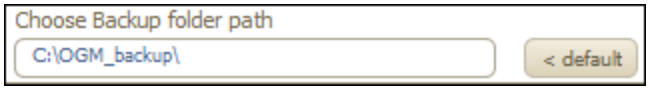


Files may be transferred to the iPhone either by email or by using a linked folder such as the free or modestly priced Dropbox.

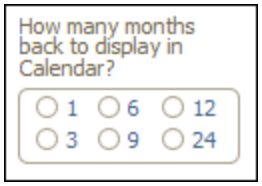
NOTE: Look for detailed instructions in the Appendix section of this manual.

Setting an alternative file backup location

A custom file backup location can be specified to save backups on an external hard drive or thumb drive. Pressing 'default' sets the backup location to C:\OGM_backup.



Setting number of past months to show in Calendar view



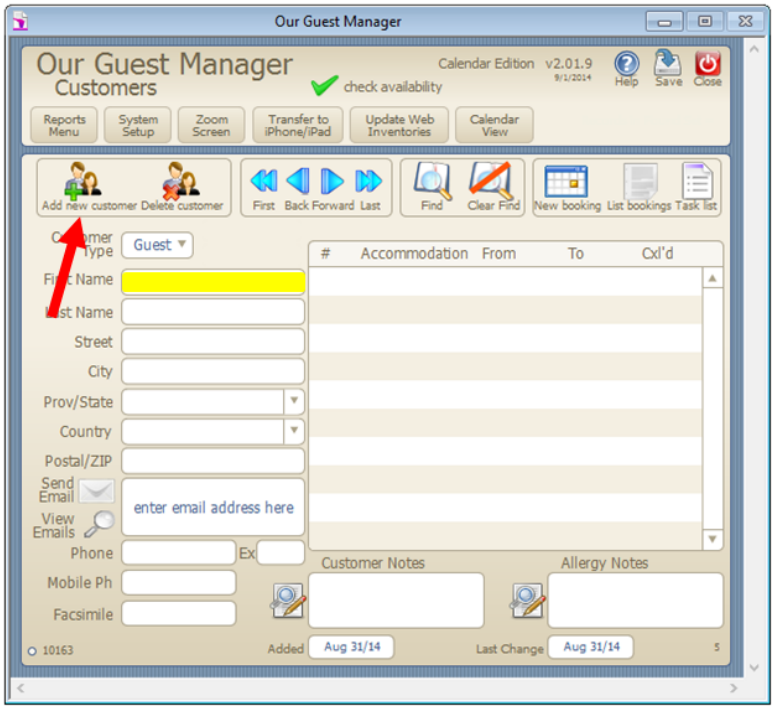
By default the Calendar will show back one month from 'today'. You may choose 3, 6, 9, 12 or 24 past months to display in the Calendar. The Calendar view always opens to the 'current month' when opened.

Entering your first customer

When you first install Our Guest Manager, you are brought to a blank customer entry screen. The system is a combination of customer and reservation management system. You cannot create booking reservations without first creating a customer entry.

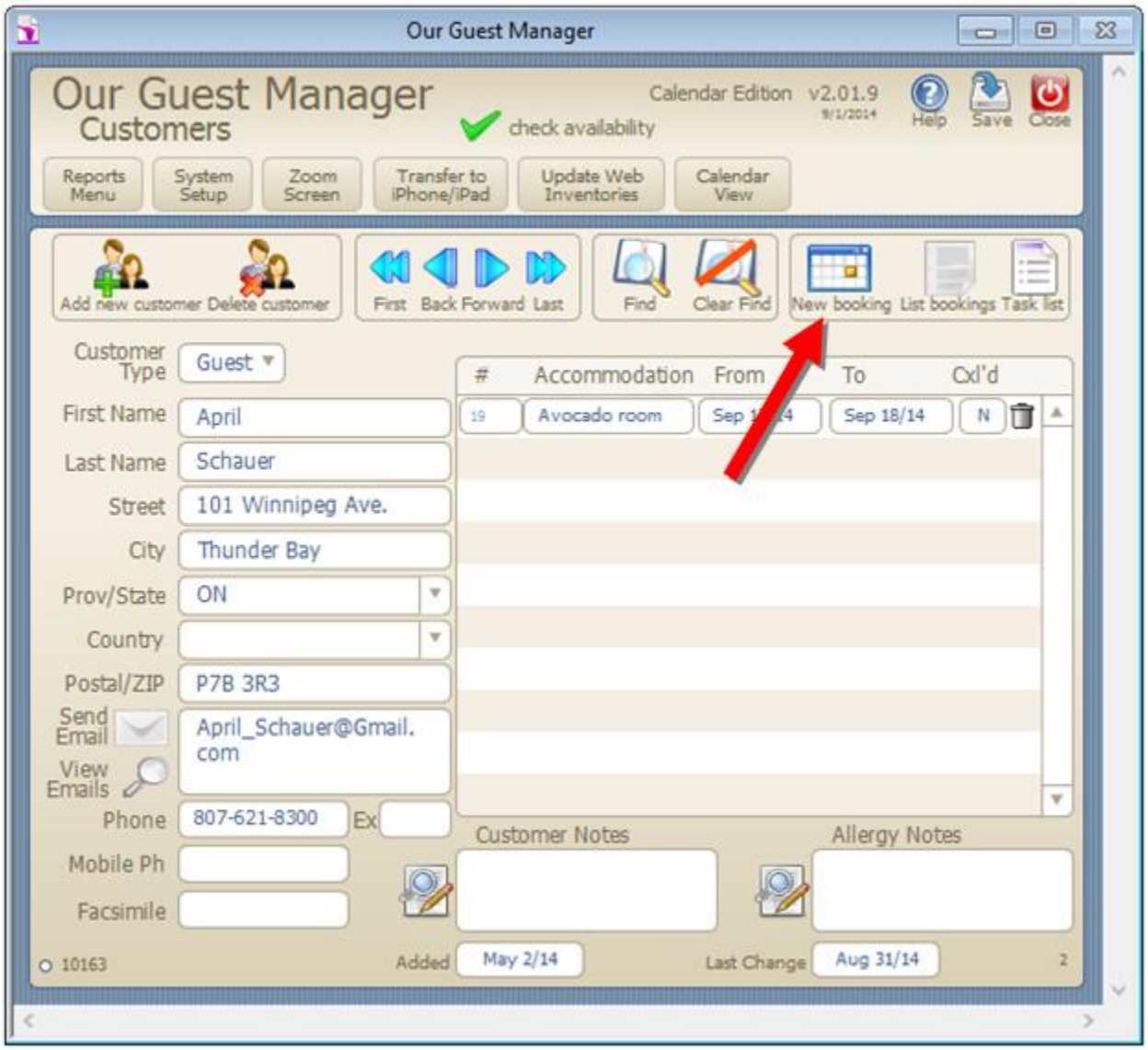
Click on the 'Add new customer' button and start entering your customer contact information.

All pertinent fields are transferred to bookings, confirmations, receipts and emails as necessary.

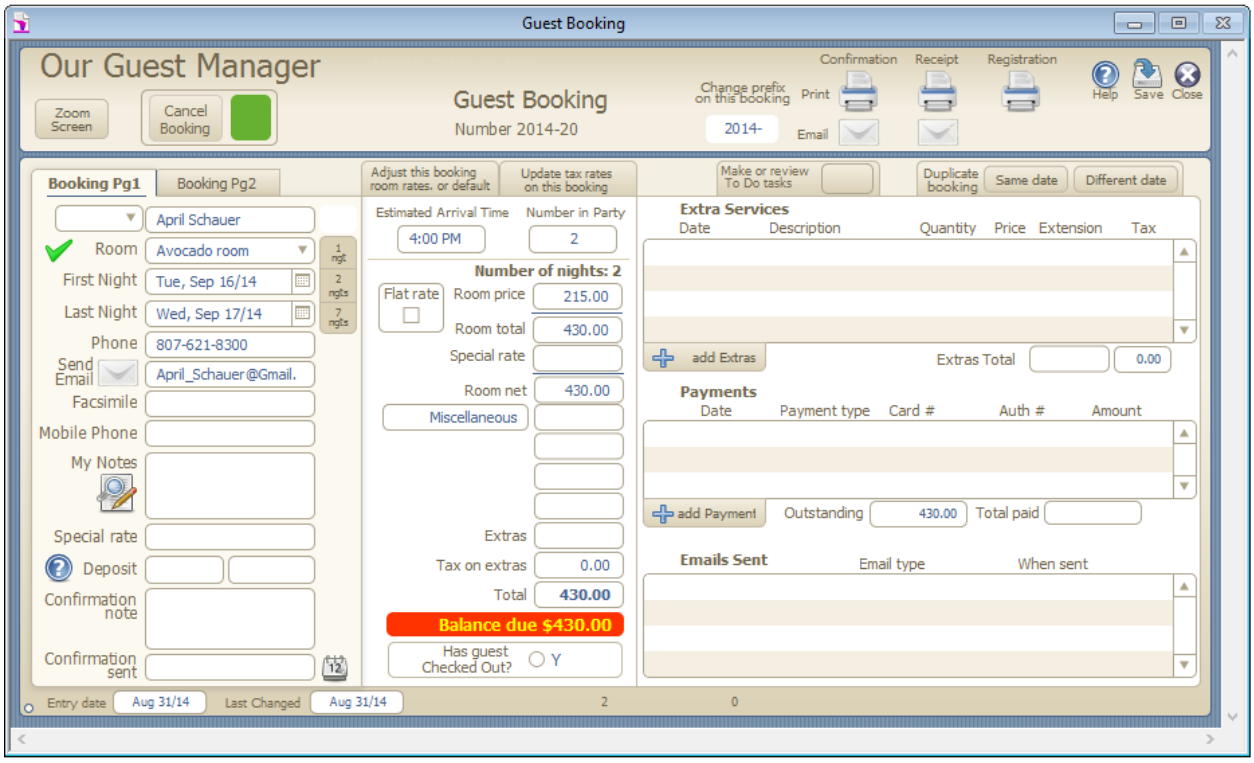


Entering reservations

From the customer screen, click on the 'New booking' button.

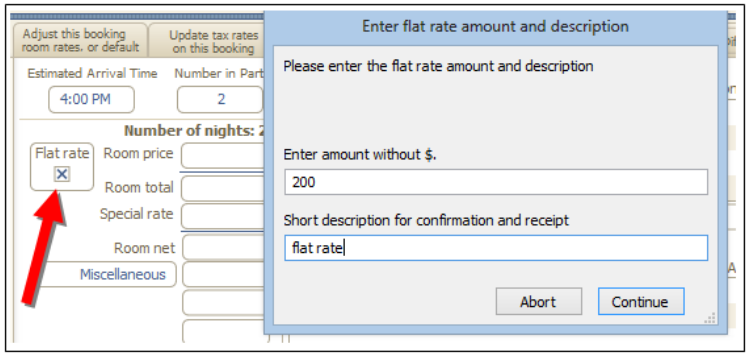


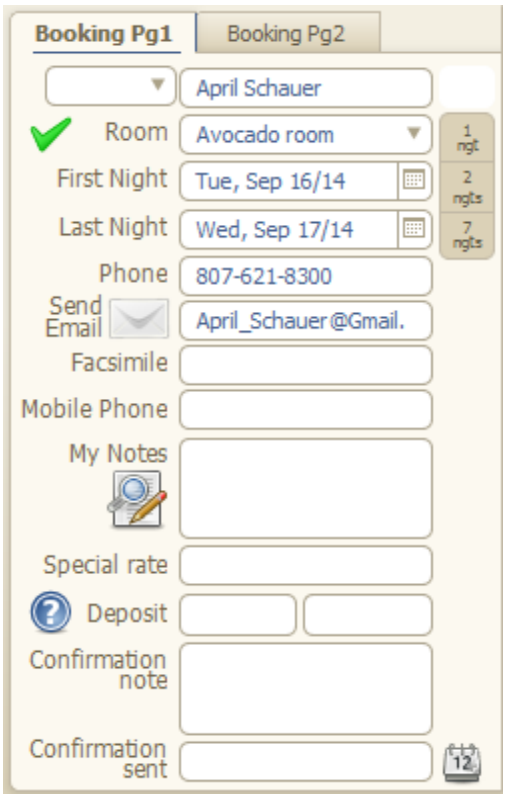
The Reservation screen shows everything you need to know in one place about the booking.



Once you choose the accommodation and set the dates, the room rates are automatically transferred to the booking screen based on the values entered into the system set-up.

If you wish to provide a flat rate for the current guest, click on the *Flat Rate* box and you will asked to enter the amount and a label for the flat rate. This will override the per-night rates.





Booking Pg1

When you create a booking, the contact information is transferred from the customer screen.

Clicking on the room field presents you with a drop-down list based on your room set-up in system preferences.

Clicking on the First or Last Night fields presents you with a drop-down calendar for ease of entering dates. Dates may also be entered manually in the format mm/dd/yyyy (e.g. 06/14/2013 for June 14, 2013). The date on the confirmation will display as June 14, 2013 regardless of how it was entered so that date confusion is eliminated.

> NOTE: If the date is in the current year, the year does not need to be entered and the system will insert the current year.

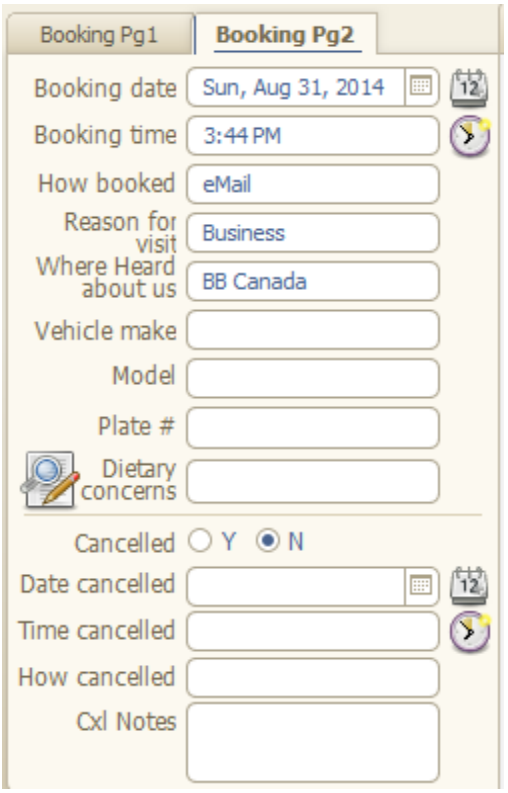
If the reservation is for one night only, click on the "1ngt" button, "2ngts" for two, "7ngts" for seven, and the Last Night field will be entered for you.

The 'Send Email' button will partially compose an email for you to complete and send.

'My notes' (click on the edit icon to view/edit in a large window) does not transfer to the confirmation but 'Confirmation note' will be included in the confirmation. This field is limited to 25 words.

'Special rate' is where you would choose a discount/premium as entered into the Special Rate tab of the Company Set-up screen.

'Deposit' fields for amount and date. Values entered on the booking override the defaults set in Policy Setup for this booking only.



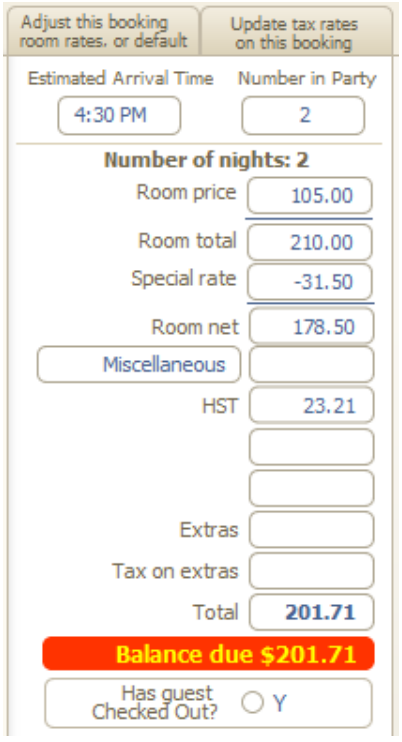
Booking Pg2

On the second booking page, click on the date icon to enter 'today's' date and the clock icon to enter the time into the booking date/time fields.

Additional fields are there to store information

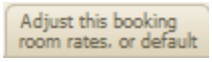
- ✓ how the booking was received
- ✓ reason for the visit
- ✓ where client heard of you
- ✓ vehicle information
- ✓ dietary concerns
- ✓ cancellation details

If your client can give you an estimated time of arrival (ETA) enter this in the field provided. A drop-down menu in half-hour increments from 3:00pm to 7pm is presented. You may enter any value by clicking on 'edit' showing at the bottom of the list. Enter time in the format hh:mm (e.g. 3:00pm or 15:00). The value will appear on the confirmation as AM or PM.

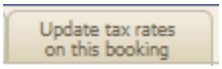


Entering the room name and dates automatically completes the pricing section and calculates tax based on the values set in the Tax Set-Up section. Any outstanding balance is displayed in the red panel below the total.

NOTE: the 'Adjust this booking rates' button lets you change the room rate for the current booking or the default rate for bookings entered after the change.



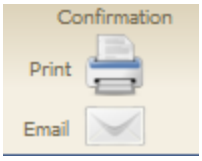
If the tax set-up changes between the time that the booking is entered into the system and the date of arrival, the tax changes can be applied to the current booking by clicking on the 'Update tax rates' button.



Once the booking has been entered, you can email or print on paper a confirmation of the booking.

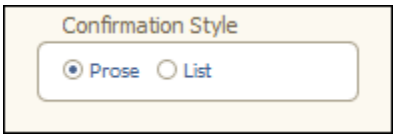
Sending a Booking Confirmation

From the reservation screen click on either the Printer icon or the Email icon.



If you wish to print, either the plain paper or letterhead layout will be presented before printing. These choices are based on the settings in the Confirmation and Receipt set-up section.

There are two versions available, Prose and List, and you make the choice during Receipt/Confirmation Setup. If no choice is made, the Prose version is used.



Prose –

We confirm your 5 night reservation, Friday, June 14, 2013 to Tuesday, June 18, 2013 in our Forestview Suite. Nightly rate: $105.00. Discount: - $52.50 Total price: $472.50, tax included.

List –

Guest name: Billy Bailey
Arrival: Friday, Jun. 14, 2013
Departure: Wednesday, Jun. 19, 2013
Total nights: 5 Nightly rate: $105.00 Discount: - $52.50 Total price: $472.50, tax included.

The Groves B & B

75 Forest Drive
Mellon Lake ON
Canada P2P 1L4

Reservation 242

May 5, 2013

To: Al Bino
635 Grey Cedar Crescent
Mississauga, ON
L4W 3J4

Cancellation Policy
* 7 days notice is required for a full refund. Cancellations less than 7 days prior to arrival will be charged one night's accommodation per suite booked
* Reservations must be held by credit card. As email is not secure, please phone in your credit card number, expiry date and name on the card in order to guarantee your reservation. Any outstanding payment is due upon check-in.

[enter the default first paragraph to appear on the printed or emailed confirmations and receipts]

We confirm your 2 night reservation, Wednesday, April 10, 2013 to Thursday, April 11, 2013 in our Forestview Suite. During your stay there is a special Corporate discount rate of $-31.50 bringing your 2 night room cost to $178.50, plus applicable taxes of $23.21.

Description: Queen sized bed with ensuite shower/toilet
Amenities: TV, Cable, DVD, VCR, telephone, WiFi
Location: 2nd level

Check-in/Check-out Policy (unless previously arranged)
* Check-in on Wednesday, April 10, 2013. Please advise your ETA before your arrival so that I will be sure to be here to greet you. Check-in is no earlier than 2:00 PM.
* Check-out on Friday, April 12, 2013 by 11:00 AM

Full payment is due upon arrival.

.

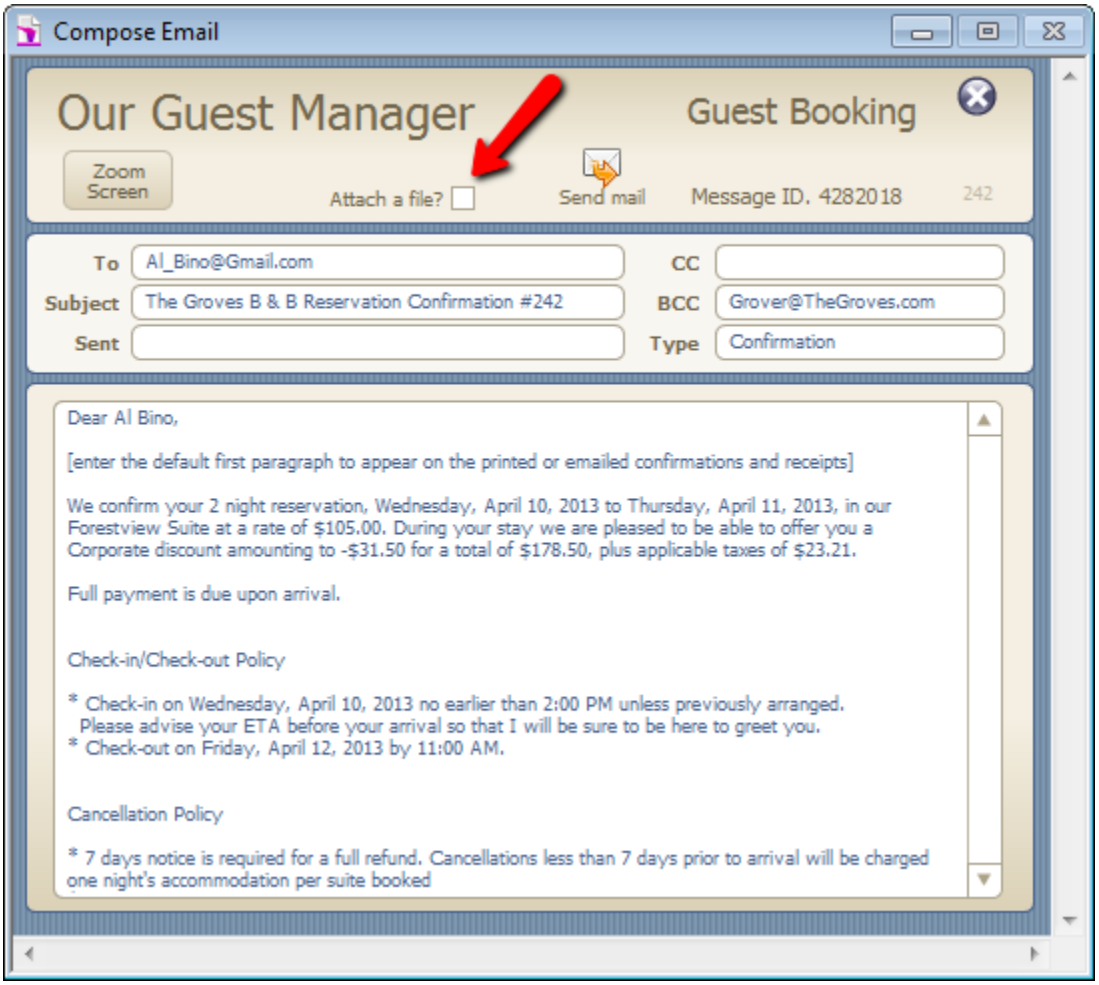
As email is not secure, please FAX or phone your credit card number, expiry date and name on the card if a deposit is required.

[enter any default notes to appear on the printed or emailed confirmations]

We look forward to meeting you and welcoming you to our home.

Grover Cleveland

If you choose to email confirmations, a new window opens –


Compose Email
Our Guest Manager
Guest Booking
Zoom Screen
Attach a file?
Send mail
Message ID. 4282018
242
To
Al_Bino@Gmail.com
CC
Subject
The Groves B & B Reservation Confirmation #242
BCC
Grover@TheGroves.com
Sent
Type
Confirmation
Dear Al Bino,
[enter the default first paragraph to appear on the printed or emailed confirmations and receipts]
We confirm your 2 night reservation, Wednesday, April 10, 2013 to Thursday, April 11, 2013, in our Forestview Suite at a rate of $105.00. During your stay we are pleased to be able to offer you a Corporate discount amounting to -$31.50 for a total of $178.50, plus applicable taxes of $23.21.
Full payment is due upon arrival.
Check-in/Check-out Policy
* Check-in on Wednesday, April 10, 2013 no earlier than 2:00 PM unless previously arranged. Please advise your ETA before your arrival so that I will be sure to be here to greet you.
* Check-out on Friday, April 12, 2013 by 11:00 AM.
Cancellation Policy
* 7 days notice is required for a full refund. Cancellations less than 7 days prior to arrival will be charged one night's accommodation per suite booked

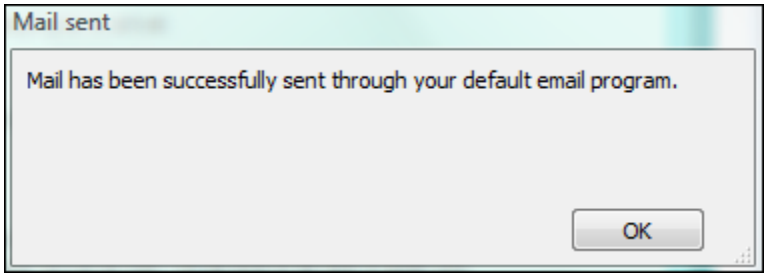
You may edit the wording before sending the email.

When you are ready to send, click the 'Send mail' button to send the email according to the choice made in System Preferences during the program set-up.

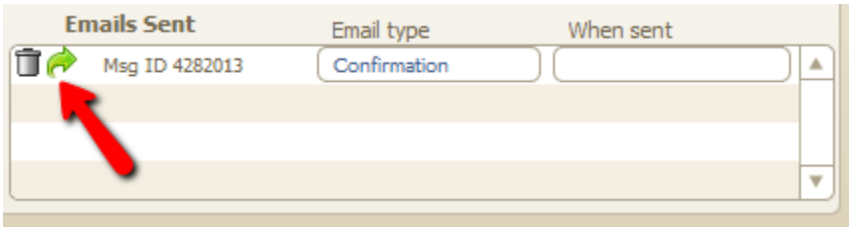
Click on the 'Attach a file?' box if you wish to send an attachment with the email.

> NOTE: a BCC copy will be sent to the address entered in Company Set-up so that a copy can be stored in your regular email set-up as well as Our Guest Manager.

A pop-up confirms that the email has been sent successfully.



The email panel at the bottom of the reservation screen shows that the email has been composed and when sent.



Click on the 'garbage can' icon to delete the record of the email from the system, or the green arrow icon to view the message.

Confirming multiple bookings

If your customer has made more than one reservation into the future, and you choose to email a confirmation, a window pops up which allows you to choose which bookings to include on the emailed confirmation.

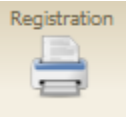
Click on the 'green dot' to the right of the booking listing to highlight and include one or more bookings. If you choose one in error, clicking on the 'red dot' deselects the booking.

Click on the "Email confirmation" envelope to open the email window for review or editing prior to sending.

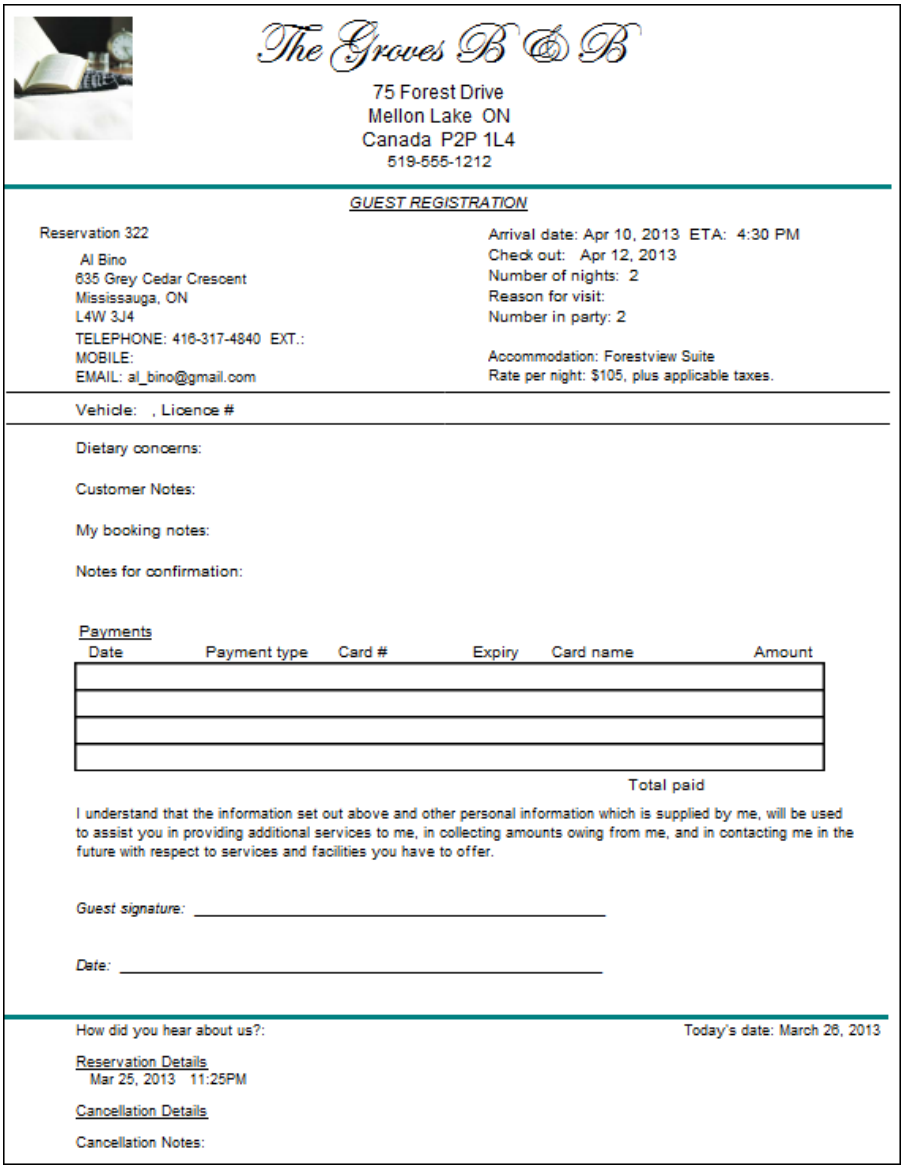
The reservations selected will be listed one after the other in chronological order.

NOTE: This feature is not available for printed confirmations due to page size restrictions.

Printing a Guest Registration form



A printable Guest Registration form is available from the booking screen by clicking on the Print Registration button.



The Groves B & B

75 Forest Drive
Mellon Lake ON
Canada P2P 1L4
519-555-1212

GUEST REGISTRATION

Reservation 322

Al Bino
635 Grey Cedar Crescent
Mississauga, ON
L4W 3J4
TELEPHONE: 416-317-4840 EXT.:
MOBILE:
EMAIL: al_bino@gmail.com

Arrival date: Apr 10, 2013 ETA: 4:30 PM
Check out: Apr 12, 2013
Number of nights: 2
Reason for visit:
Number in party: 2

Accommodation: Forestview Suite
Rate per night: $105, plus applicable taxes.

Vehicle: , Licence #

Dietary concerns:

Customer Notes:

My booking notes:

Notes for confirmation:

Payments

Date	Payment type	Card #	Expiry	Card name	Amount

Total paid

I understand that the information set out above and other personal information which is supplied by me, will be used to assist you in providing additional services to me, in collecting amounts owing from me, and in contacting me in the future with respect to services and facilities you have to offer.

Guest signature: _____

Date: _____

How did you hear about us?:

Today's date: March 26, 2013

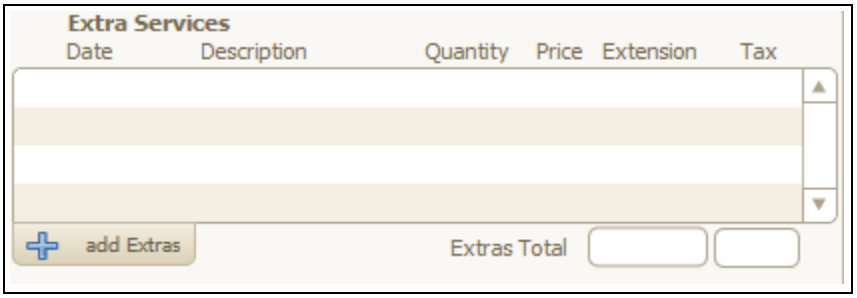
Reservation Details
Mar 25, 2013 11:25PM

Cancellation Details

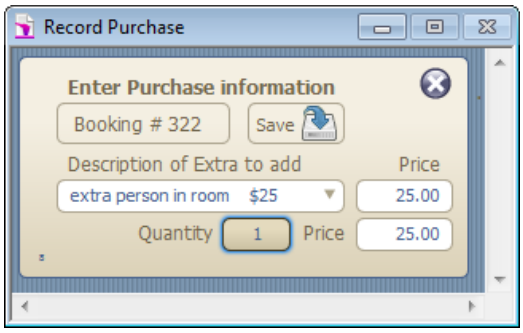
Cancellation Notes:

Recording Extras Purchased

From the Reservation screen, click on the 'add extras' button in the Extra Services section.



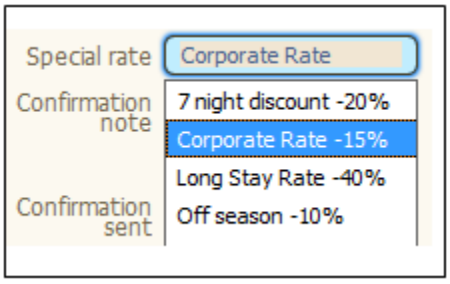
A new window opens and you can add the sale of this Extra service to the reservation. Entering the Description field presents you with a pull-down menu of Extras set-up that are marked available for sale.



Hit 'Save' to save the purchase on the reservation and add the cost to the record.

Taxes are automatically added based on tax choices in Tax Set-up and Extras Set-up.

Recording Special Pricing

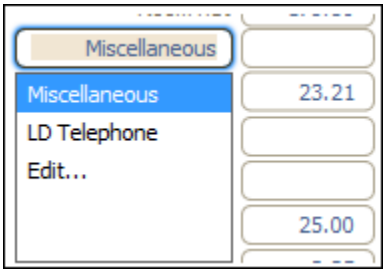


To record a discount or premium price, make sure that you first create it in the Special Rate Set-up section.

Simply enter the Special Rate field on the reservation screen and you will be presented with a drop-down menu of those items entered into the Set-up section.

The Special rate will be reflected in the price panel.

Recording Miscellaneous Charges

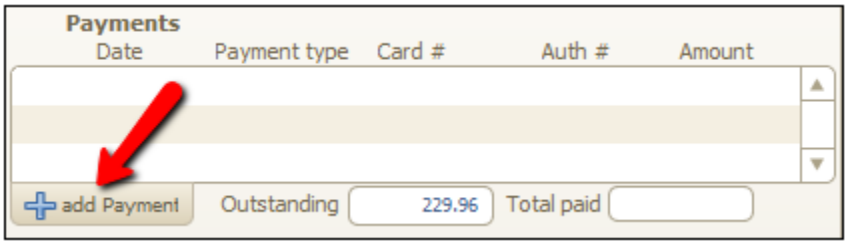


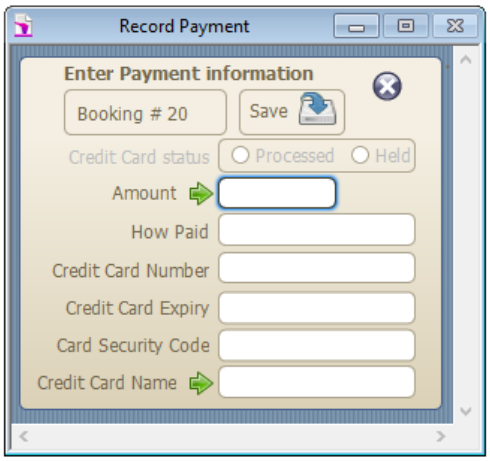
Miscellaneous charges may be entered directly into the Reservation screen.

You will be presented with an editable drop-down menu. Entries automatically are added to the invoice price. Tax is applied based on the Tax Set-up previously discussed.

Recording Payments

Click on the 'add Payment' button in the Payments section of the Reservation screen to record a payment.

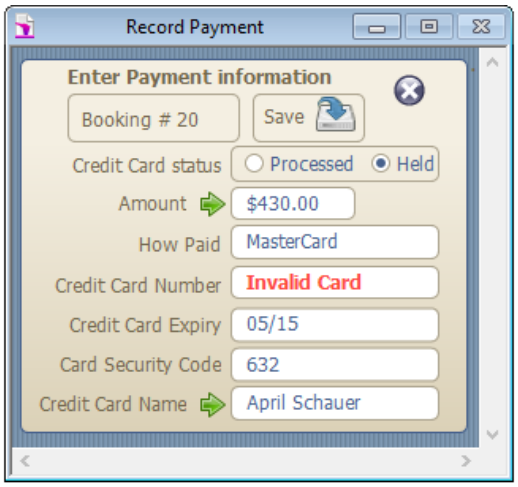




Clicking on the *green arrow* beside the 'Amount' box will automatically enter the total outstanding balance for you. Of course, any amount can be entered.

NOTE: Credit card numbers must be entered without spaces.

NOTE: If the credit card number does not pass the test for correctly entered numbers, you will see 'Invalid Card' displayed. This does NOT mean that the card is bad but simply that the card number may have been entered incorrectly. It is a quick way to check the entry prior to processing the payment through your credit card system.



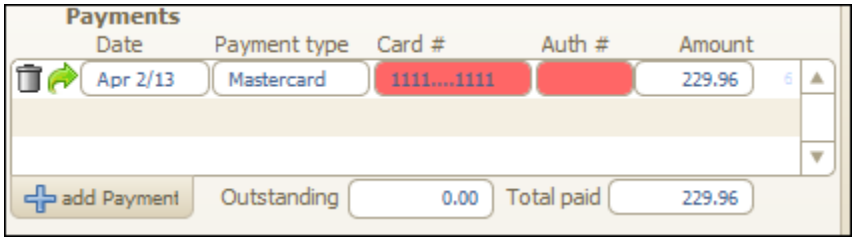
NOTE: Credit card payments can be marked as "Processed" or "Held". Held payments will not change the outstanding amount until later changed to processed.

NOTE: As Our Guest Manager is not linked to your card processor, this is simply a warning.

Clicking the 'Save' button places the record of the payment on the reservations page. For security, credit card numbers are not fully shown.

After the card has been processed, enter the processing Authorization number in the field provided.

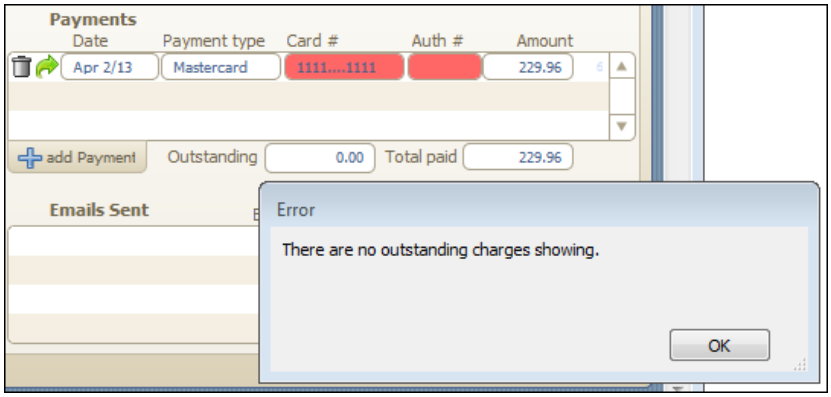
NOTE: Until you enter the Authorization number, the card number field and the authorization field will remain highlighted in red as a visual cue.



Once payments equal to the total due have been entered, the Outstanding Due field will turn Green from Red.

NOTE: Once the full Balance Due has been entered, the system will not allow you to record another.

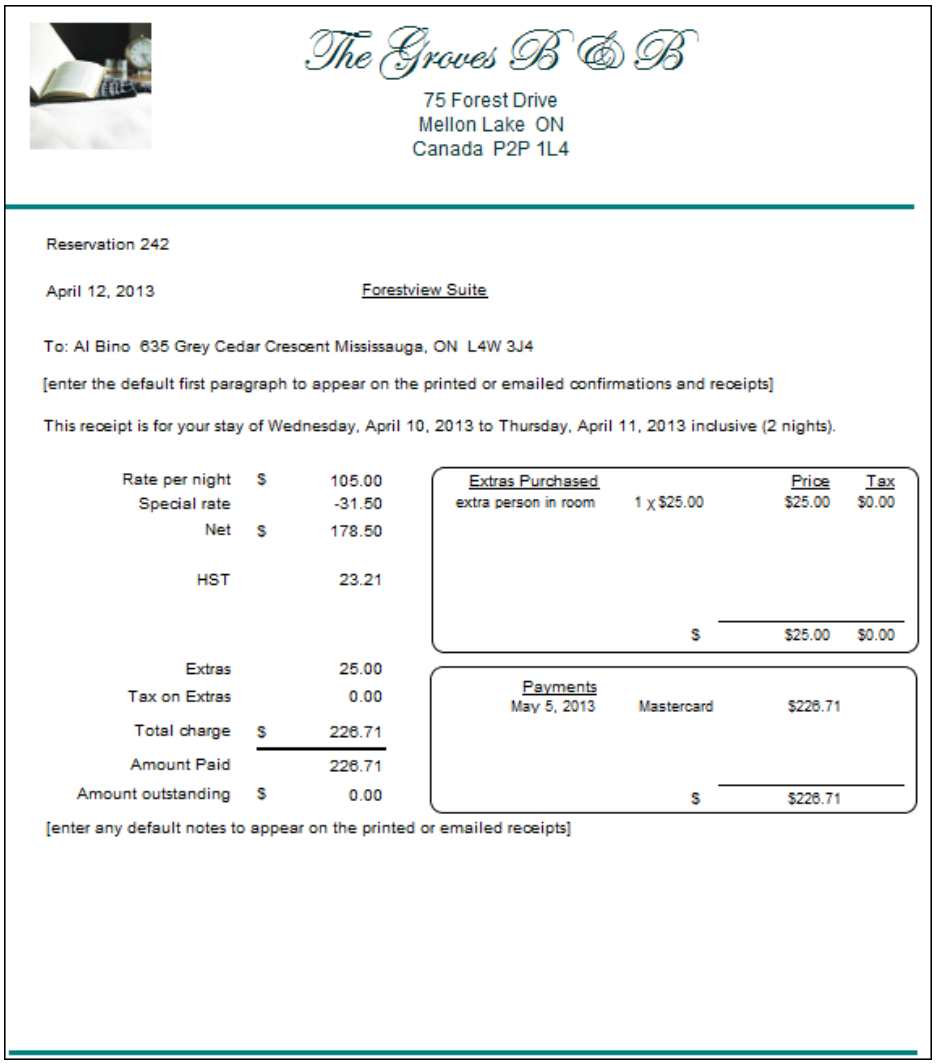
NOTE: If, while recording an amount, you enter a value which would result in an overpayment, you would receive a warning.



Sending a receipt

From the reservation screen click on either the Print Receipt or Email Receipt button.

If you wish to print, either the plain paper or letterhead layout will be presented before printing. These choices are based on the settings in the Confirmation and Receipt set-up section.



The Groves B & B
75 Forest Drive
Mellon Lake ON
Canada P2P 1L4

Reservation 242

April 12, 2013 Forestview Suite

To: Al Bino 635 Grey Cedar Crescent Mississauga, ON L4W 3J4

[enter the default first paragraph to appear on the printed or emailed confirmations and receipts]

This receipt is for your stay of Wednesday, April 10, 2013 to Thursday, April 11, 2013 inclusive (2 nights).

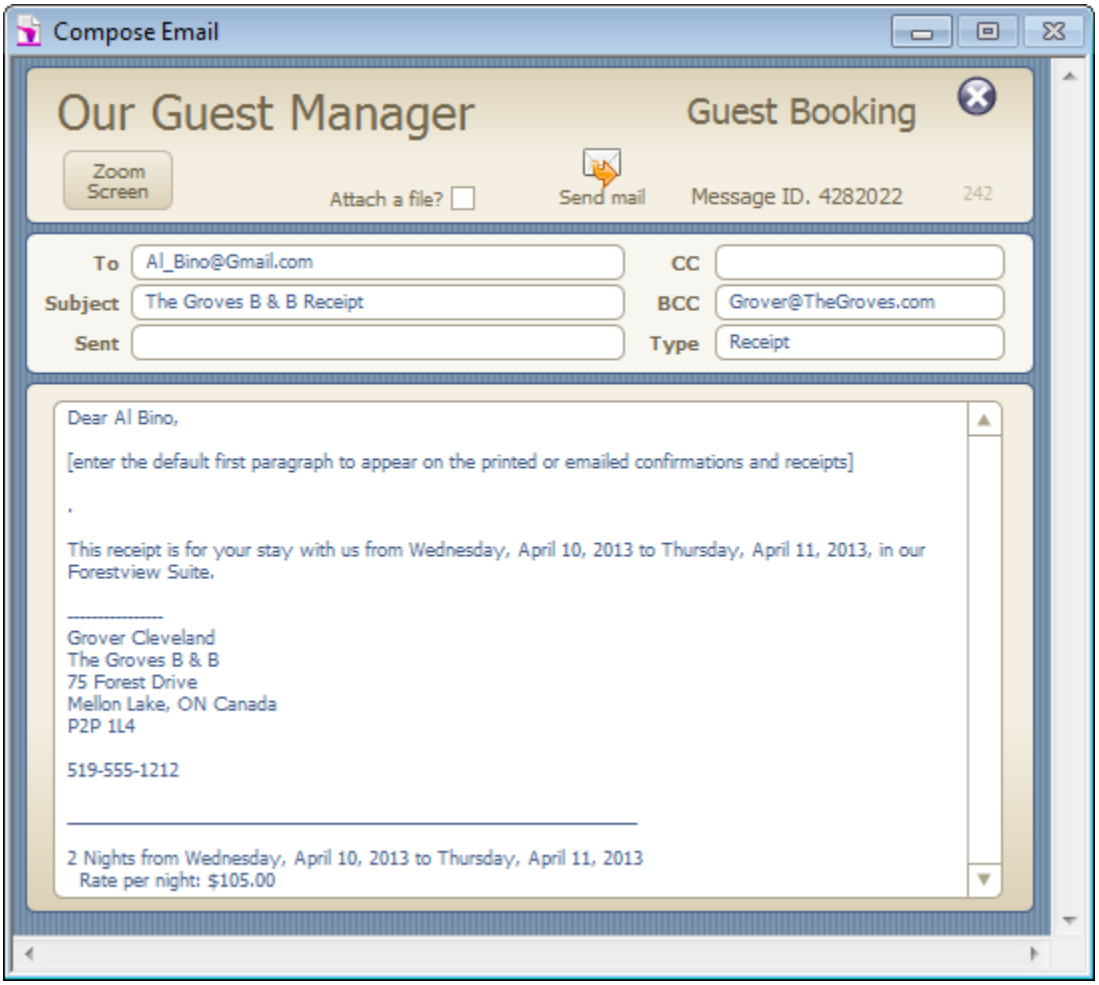
Rate per night	$	105.00
Special rate		-31.50
Net	$	178.50
HST		23.21
Extras		25.00
Tax on Extras		0.00
Total charge	$	226.71
Amount Paid		226.71
Amount outstanding	$	0.00

Extras Purchased		Price	Tax
extra person in room	1 x $25.00	$25.00	$0.00
	$	$25.00	$0.00

Payments		
May 5, 2013	Mastercard	$226.71
	$	$226.71

[enter any default notes to appear on the printed or emailed receipts]

If you choose to email receipts, a new window opens –

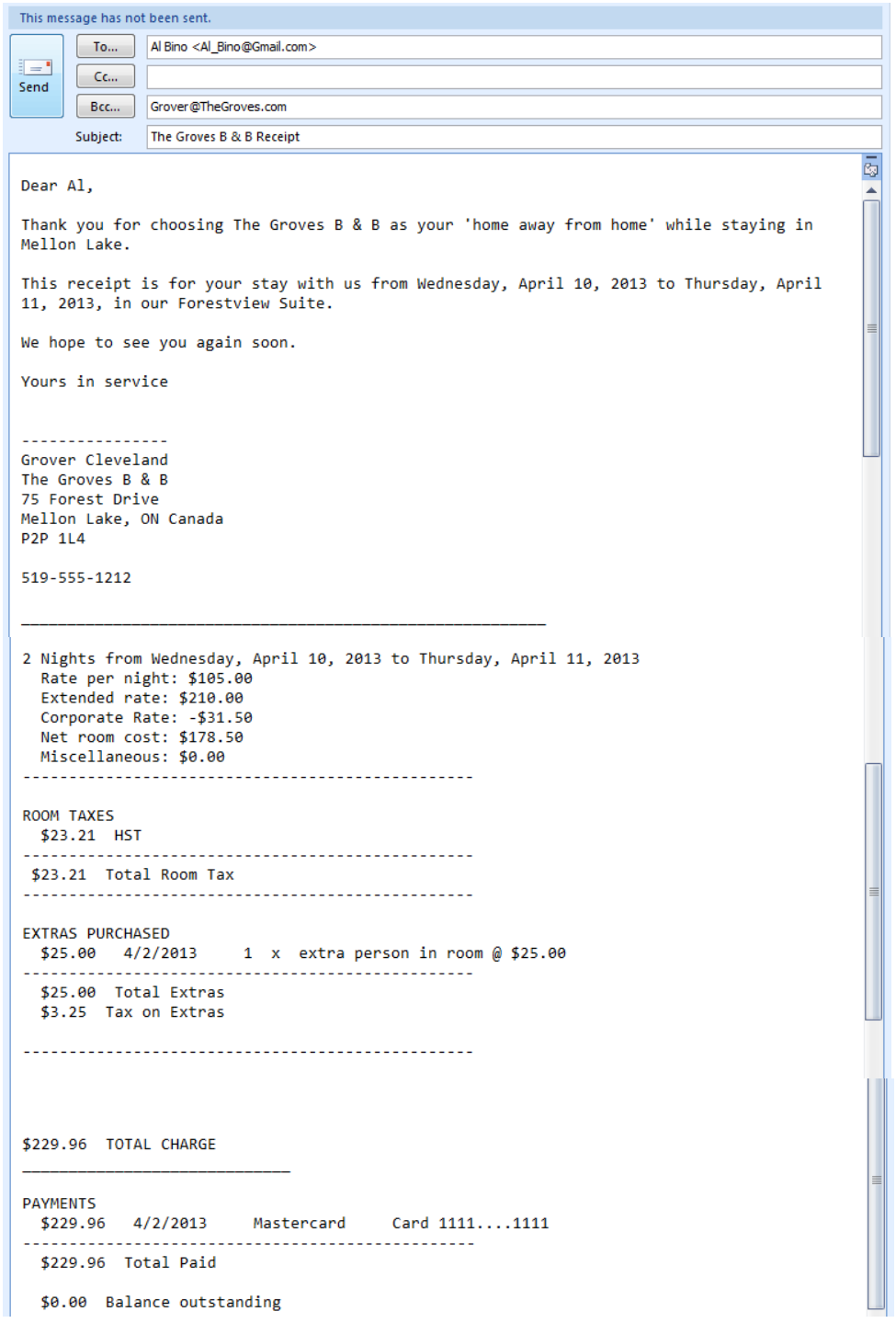


You may edit the wording before sending the email.

When you are ready to send, click the 'Send mail' button to open your default email client program or send directly through your SMTP server, depending on how your email was set-up.

Click on the 'Attach a file?' box if you wish to send an attachment with the email.

NOTE: a BCC copy will be sent to the address entered in Company Set-up.



This message has not been sent.

Send

To... Al Bino <Al_Bino@Gmail.com>

Cc...

Bcc... Grover@TheGroves.com

Subject: The Groves B & B Receipt

Dear Al,

Thank you for choosing The Groves B & B as your 'home away from home' while staying in Mellon Lake.

This receipt is for your stay with us from Wednesday, April 10, 2013 to Thursday, April 11, 2013, in our Forestview Suite.

We hope to see you again soon.

Yours in service

Grover Cleveland
The Groves B & B
75 Forest Drive
Mellon Lake, ON Canada
P2P 1L4

519-555-1212

---

2 Nights from Wednesday, April 10, 2013 to Thursday, April 11, 2013
  Rate per night: $105.00
  Extended rate: $210.00
  Corporate Rate: -$31.50
  Net room cost: $178.50
  Miscellaneous: $0.00

ROOM TAXES
  $23.21 HST

 $23.21 Total Room Tax

EXTRAS PURCHASED
  $25.00   4/2/2013   1 x extra person in room @ $25.00

  $25.00 Total Extras
  $3.25 Tax on Extras

$229.96 TOTAL CHARGE

PAYMENTS
  $229.96   4/2/2013   Mastercard   Card 1111....1111

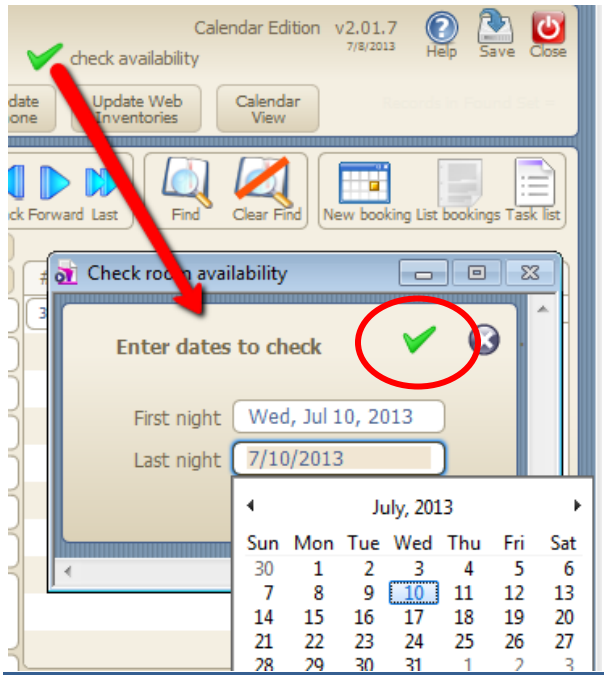
  $229.96 Total Paid

  $0.00 Balance outstanding

Checking availability

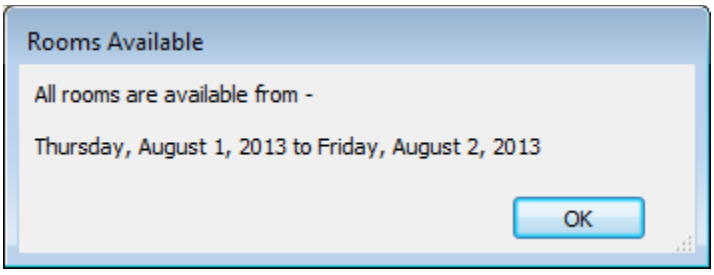
There are two places where you can check for room availability:

From the Customer Screen

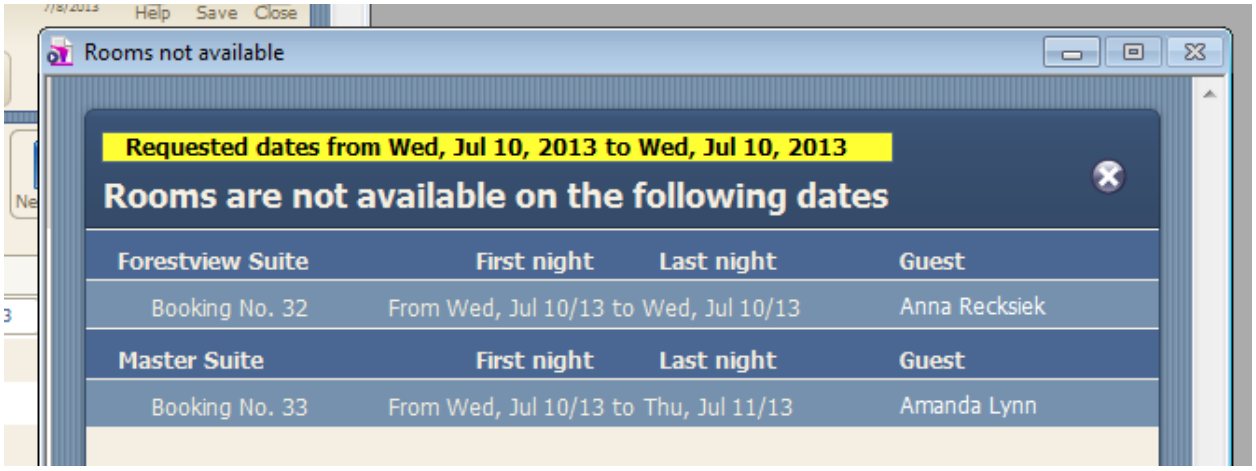


Clicking on the green check mark at the top of the customer screen pulls up a dialog box where you enter the first and last nights of the stay. Then click on the green check mark on the date dialog to get results.

If ALL rooms are **available**, then you will be advised –



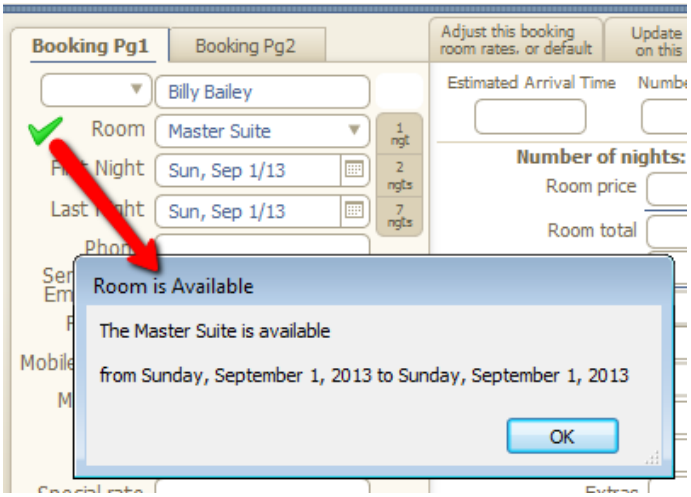
If SOME rooms are **booked** during the period then –


Help Save Close
Rooms not available
Requested dates from Wed, Jul 10, 2013 to Wed, Jul 10, 2013
Rooms are not available on the following dates
Forestview Suite First night Last night Guest
Booking No. 32 From Wed, Jul 10/13 to Wed, Jul 10/13 Anna Recksiek
Master Suite First night Last night Guest
Booking No. 33 From Wed, Jul 10/13 to Thu, Jul 11/13 Amanda Lynn

This table is sorted by room name the first night and shows what is NOT available.

From the Booking Screen

Clicking on the green check mark on the booking **before** it has been saved will use those dates entered and provide you with the same two result dialogs.



Managing Agent Bookings

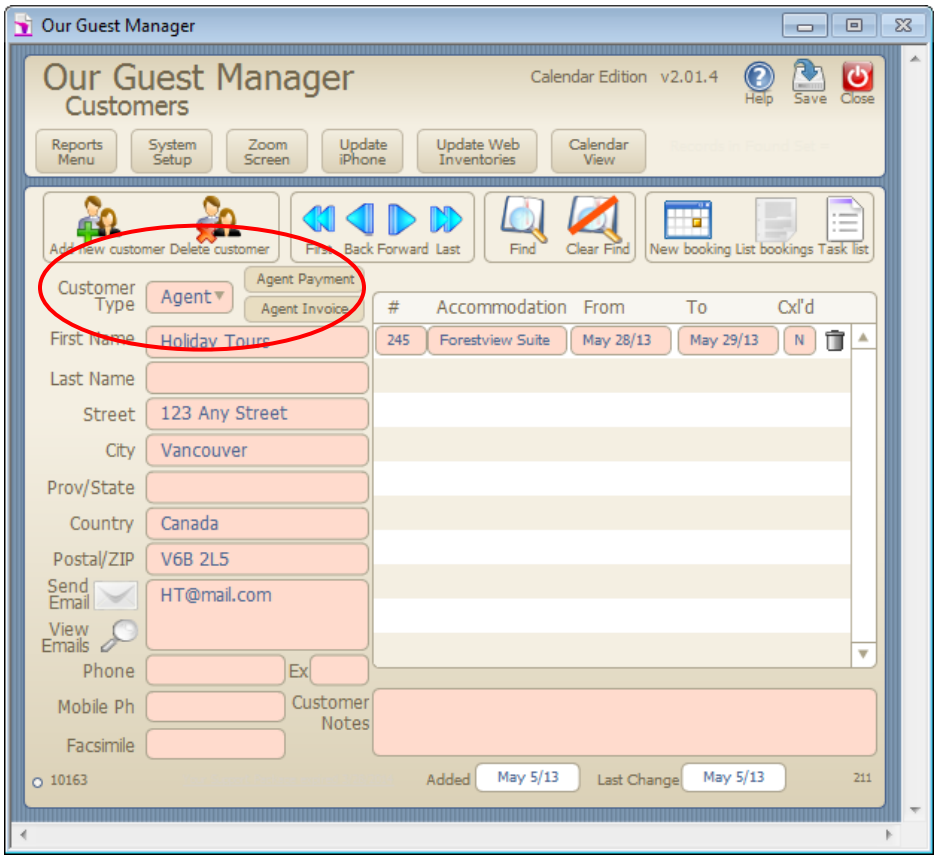
If you take bookings from agents, you have the ability to record a bulk payment against the agent 'customer' and prepare an agent invoice.

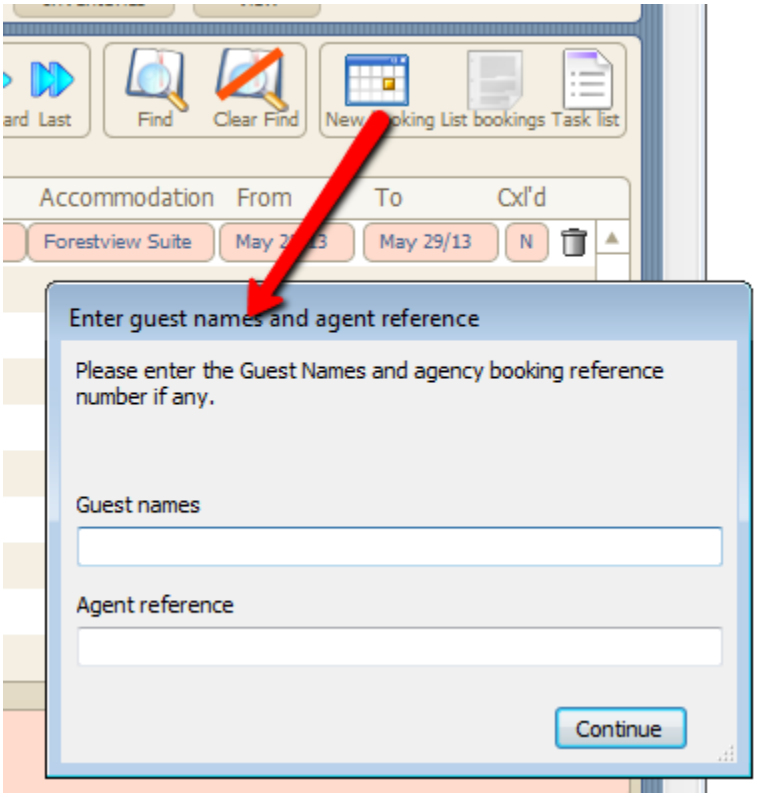
It starts with the Customer profile screen

Designating the Customer as an Agent makes some changes to the program:

1. field background is salmon coloured as a visual cue

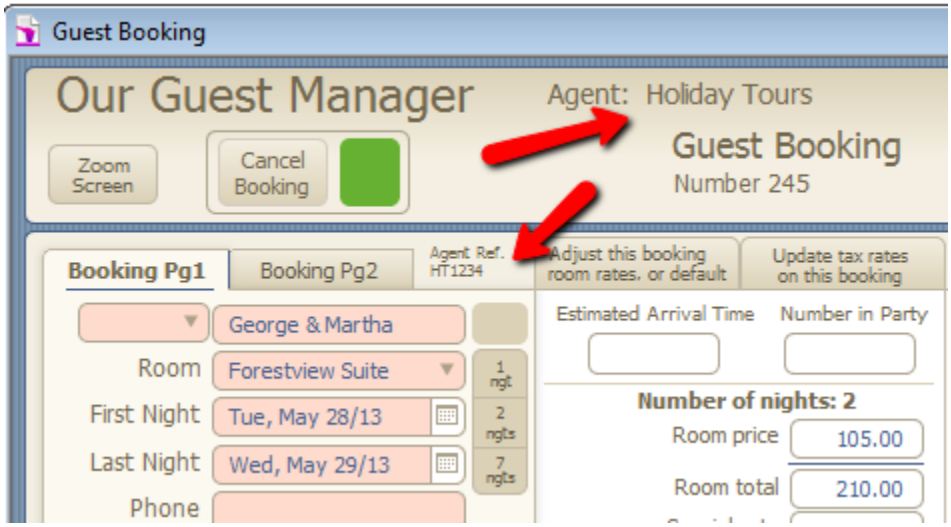
2. 'Agent Payment' and 'Agent Invoice' buttons become live





If the customer is an Agent, clicking on the 'New Booking' button brings up a new window where you enter the name of the guest/s and an Agent reference if available.

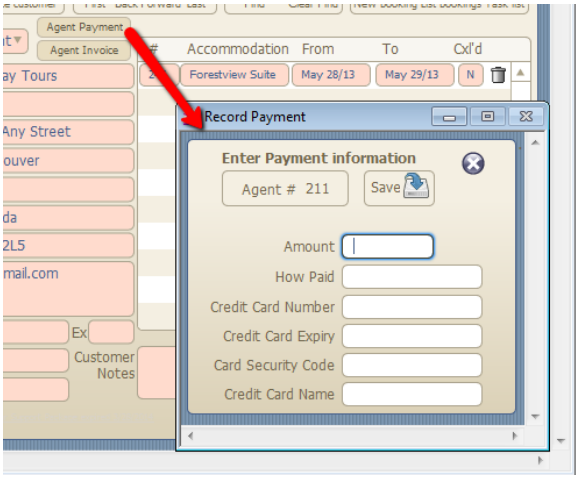
How the reservation looks



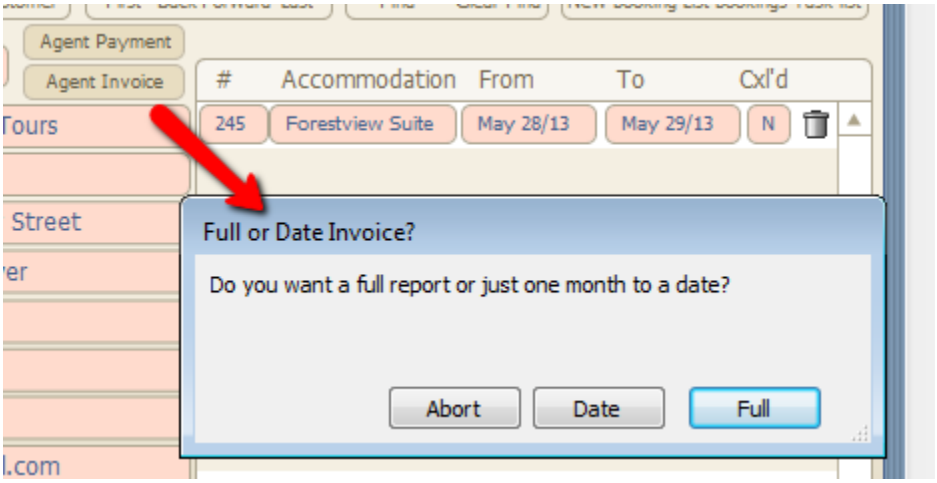
- ✓ The field background is also salmon coloured
- ✓ The agent provided reference number is shown on the booking
- ✓ The agent is shown at the top of the reservation screen

Recording payments received

Payments can be recorded either by clicking on the 'add Payment' button on the reservation screen (as usual) which will only apply the payment the current reservation, or by clicking on the 'Agent Payment' button on the customer screen.



Invoicing agents

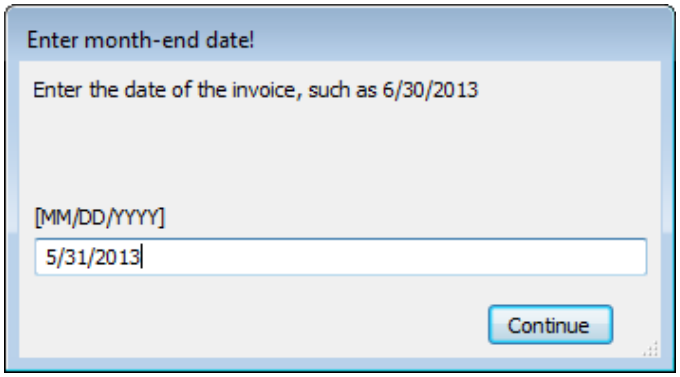

Agent Payment
Agent Invoice
Accommodation From To Cxl'd
245 Forestview Suite May 28/13 May 29/13 N
Full or Date Invoice?
Do you want a full report or just one month to a date?
Abort
Date
Full

When you click on the 'Agent Invoice' button you will be asked if you want to create a 'full' or 'date' invoice.

The former will produce a 'full' report back to the first booking by the agent customer.

The latter will produce a 'date' report where you enter the last day of the month/year you wish the invoice for. For example, at the end of May you would run a 'date' invoice for May 31.

The report will calculate any outstanding or over payments to the end of the previous month and show the brought forward amount onto the May invoice.



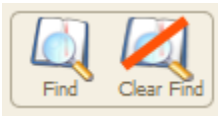
Invoice

Holiday Tours
123 Any Street
Vancouver V6B 2L5

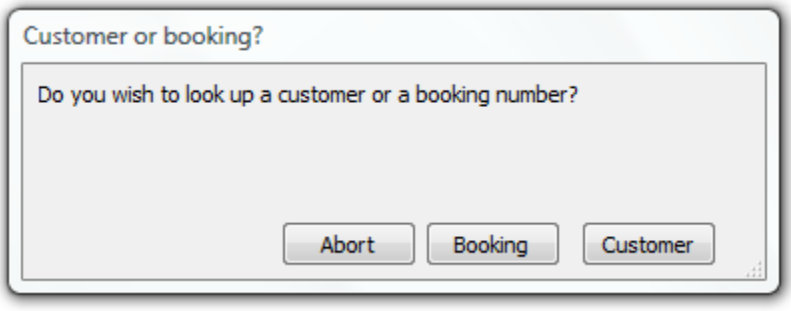
Agent reference	Guest	First Night	Last Night	Amount	Payment	Booking ID	Date posted
			Balance forward	0.00			
				0.00		246	5/5/2013
HT1234	George & Martha Henry	5/28/2013	5/29/2013	237.30		245	5/5/2013
			Current amount due	237.30	(Over payment if -)		
			Amount outstanding	**237.30**			

Finding things

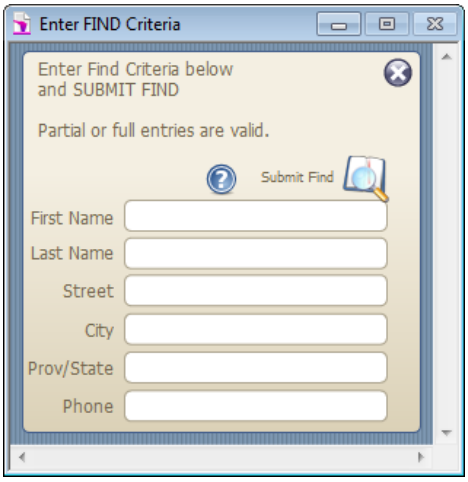
The 'Find' button is located on the customer home page.



Clicking on the button, you are given a choice to look up a customer or a booking.



Customers



If you wish to find an existing customer in your database, click on 'Customer'.

You may enter as much or as little information in the search boxes –

- ✓ First name
- ✓ Last name
- ✓ Street
- ✓ City
- ✓ Prov/State
- ✓ Phone

Then hit 'Submit Find'

Anything you enter is used as part of the customer search. If you enter something that the system can't find, then your search will fail.

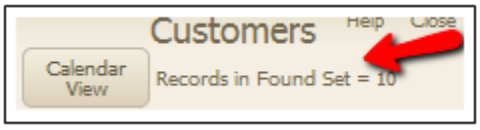
Example: Mary Smith lives at 353 Lexington Way, Cambridge, ON. Her phone number is 519 722 5555.

If you enter 'Mary' in the First Name field, the system will find ALL customers with first name = 'Mary', which could be quite a few.

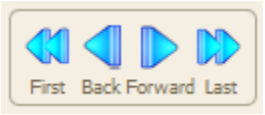
Narrow the search by entering 'Mary' in the First Name field and 'Sm' in the Last Name field. This will find ALL customers with first name = 'Mary' and last name with the letters 'sm' in the name. You would find Mary Smith, Mary Smythe, Mary Esme, etc.

You can further narrow the search by entering a partial city of partial phone number.

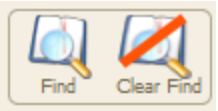
If your search is successful, you are returned to the customer home page and you will notice that the number of records (customers) matching the search entries is 10.



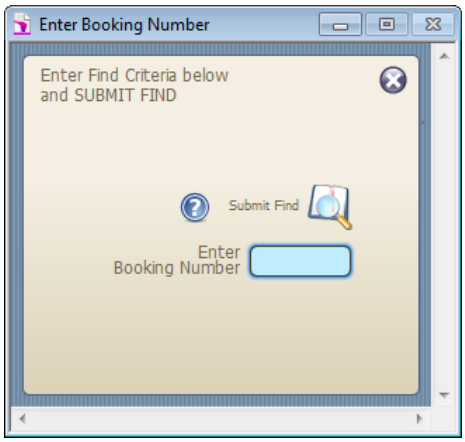
You may move forwards and backwards through the records using the scroll buttons.



Clear your 'Find' set to reset your records ready for display to all the records in the database, click on the 'Clear Find' button.



Bookings

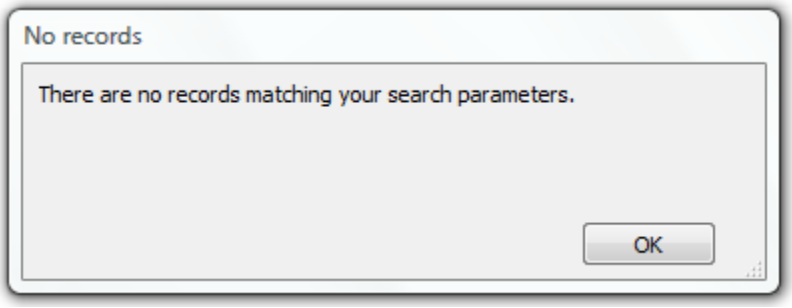


If you wish to find an existing booking in your database, click on 'Booking'.

This is a much simpler search with only one field, the Booking number.

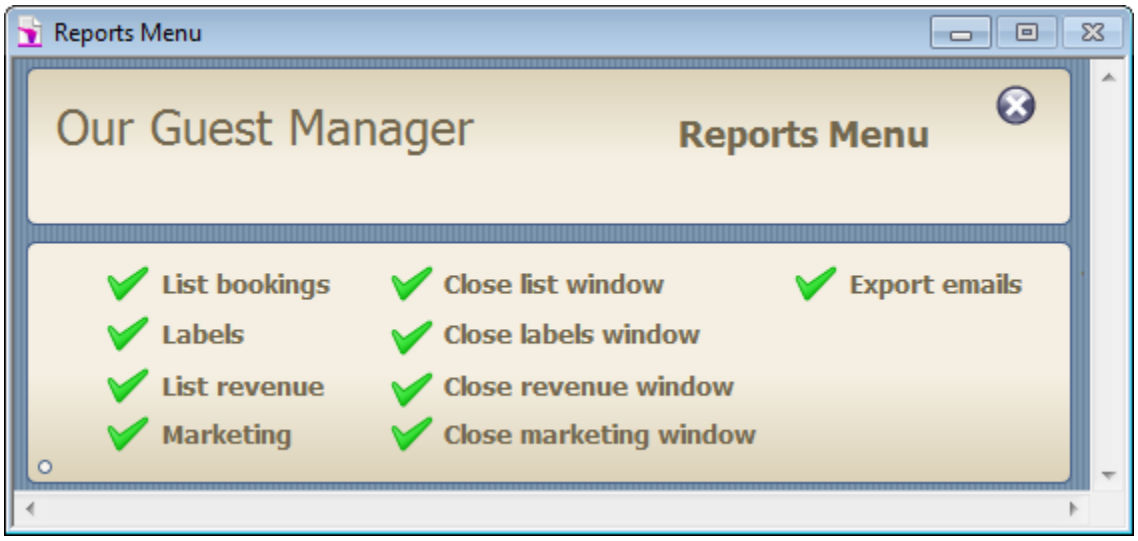
This is perfect for looking up a future booking quickly if you receive a phone call or email from a guest who tells you their booking number.

If either search fails, you will be notified –

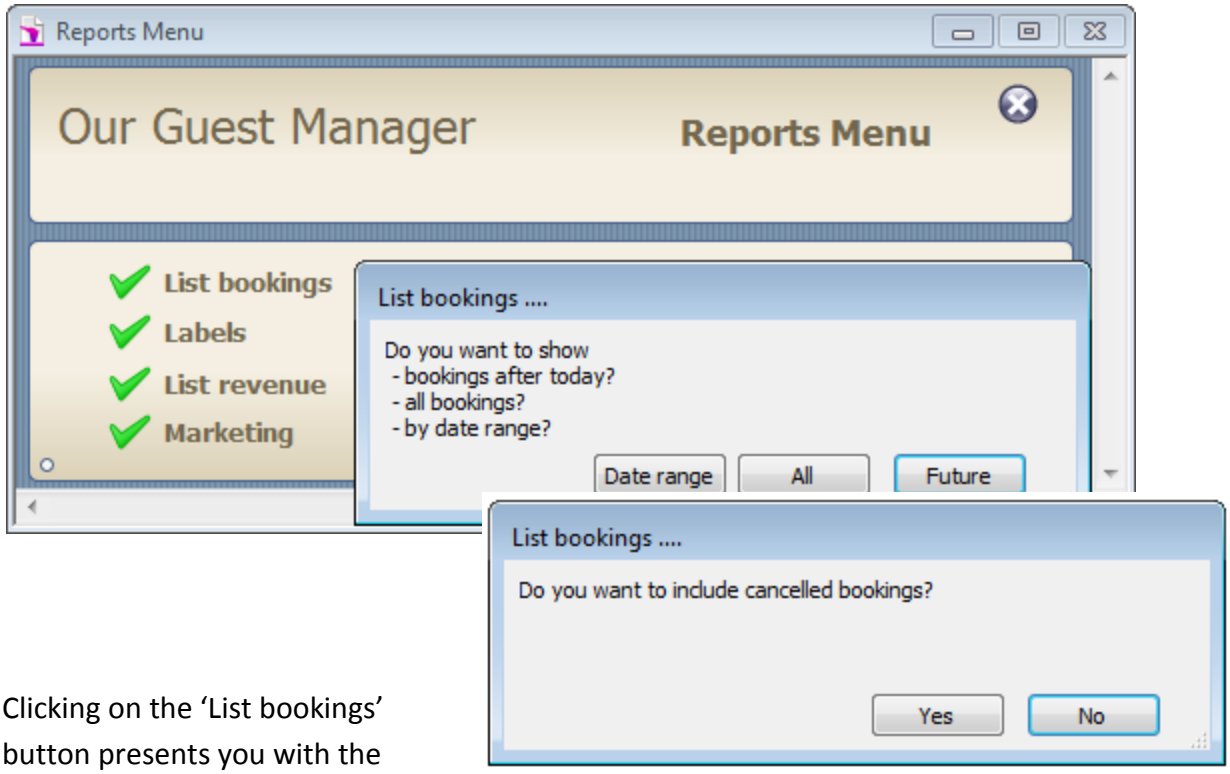


Reports Menu

Our Guest Manager offers 4 reports, all accessible by clicking on the Reports Menu button from the Customer screen, plus exporting names and email address to an external file.



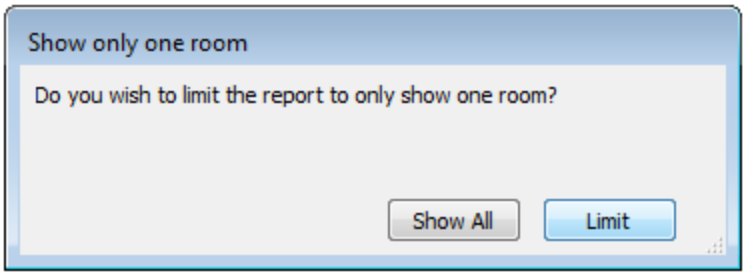
Listing Bookings

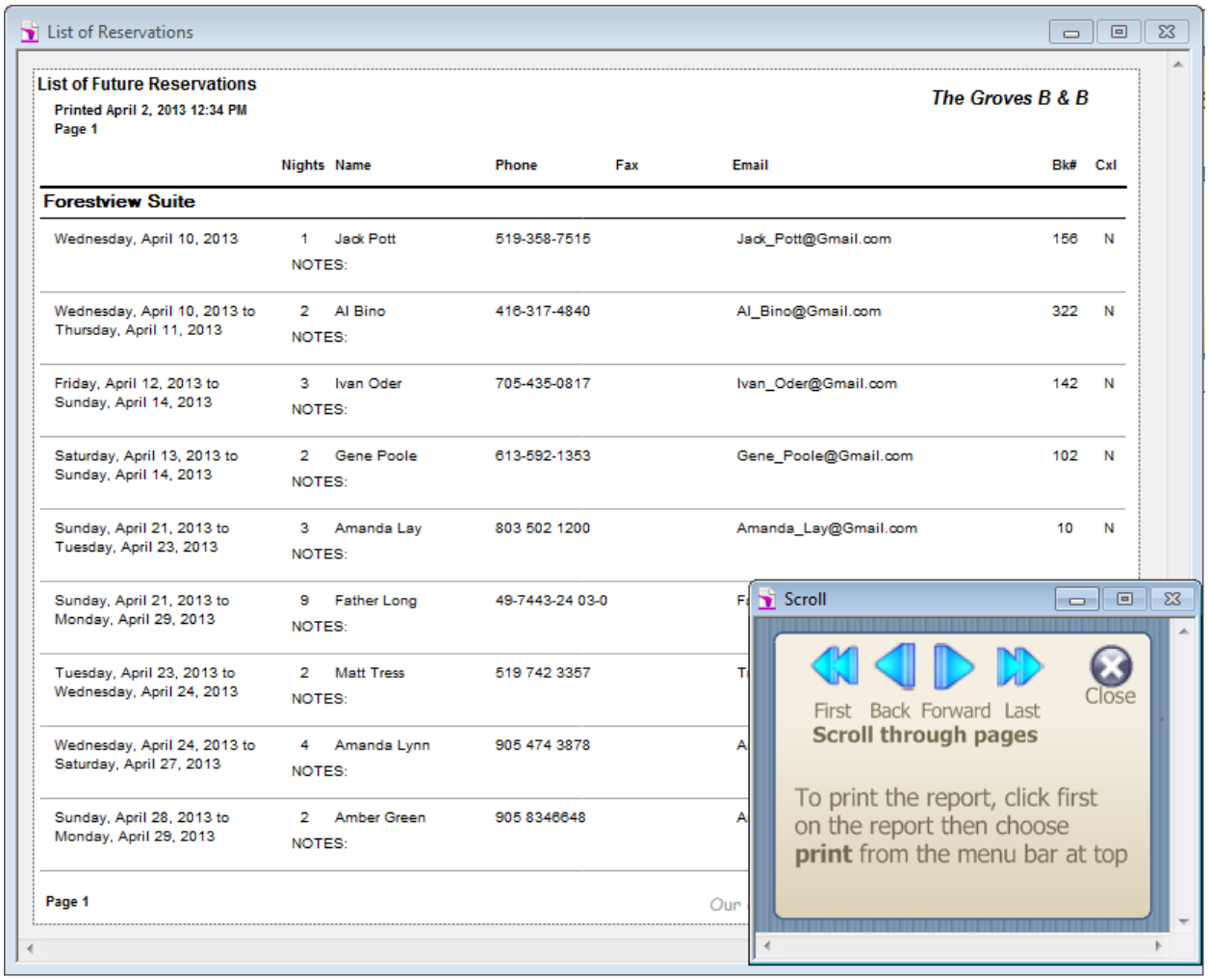


Clicking on the 'List bookings' button presents you with the following choices –

- ✓ show bookings after 'Today' or All bookings or by Date Range
- ✓ include cancelled bookings in the list or not

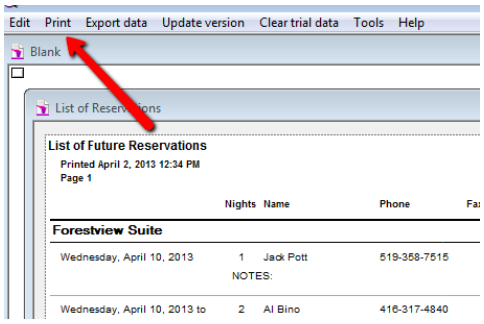
You may also limit the search by room.




List of Reservations
List of Future Reservations
Printed April 2, 2013 12:34 PM
Page 1
The Groves B & B
Nights Name Phone Fax Email Bk# Cxl
Forestview Suite
Wednesday, April 10, 2013 1 Jack Pott 519-358-7515 Jack_Pott@Gmail.com 156 N
NOTES:
Wednesday, April 10, 2013 to Thursday, April 11, 2013 2 Al Bino 416-317-4840 Al_Bino@Gmail.com 322 N
NOTES:
Friday, April 12, 2013 to Sunday, April 14, 2013 3 Ivan Oder 705-435-0817 Ivan_Oder@Gmail.com 142 N
NOTES:
Saturday, April 13, 2013 to Sunday, April 14, 2013 2 Gene Poole 613-592-1353 Gene_Poole@Gmail.com 102 N
NOTES:
Sunday, April 21, 2013 to Tuesday, April 23, 2013 3 Amanda Lay 803 502 1200 Amanda_Lay@Gmail.com 10 N
NOTES:
Sunday, April 21, 2013 to Monday, April 29, 2013 9 Father Long 49-7443-24 03-0
NOTES:
Tuesday, April 23, 2013 to Wednesday, April 24, 2013 2 Matt Tress 519 742 3357
NOTES:
Wednesday, April 24, 2013 to Saturday, April 27, 2013 4 Amanda Lynn 905 474 3878
NOTES:
Sunday, April 28, 2013 to Monday, April 29, 2013 2 Amber Green 905 8346648
NOTES:
Page 1
Scroll
First Back Forward Last
Close
Scroll through pages
To print the report, click first on the report then choose print from the menu bar at top

Once viewing the report you may scroll through the pages using the familiar scroll buttons.

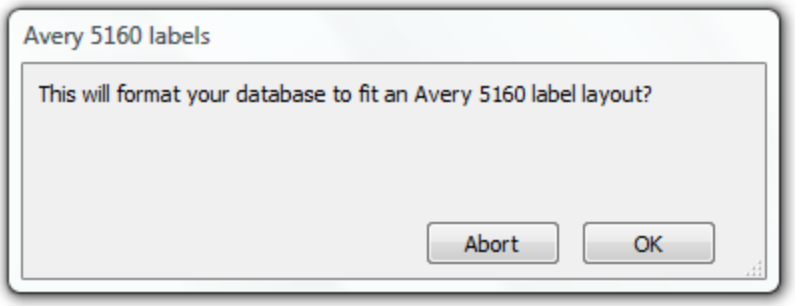
Click X to close the report.


Edit Print Export data Update version Clear trial data Tools Help
Blank
List of Future Reservations
Printed April 2, 2013 12:34 PM
Page 1
Nights Name Phone
Forestview Suite
Wednesday, April 10, 2013 1 Jack Pott 519-358-7515
NOTES:
Wednesday, April 10, 2013 to 2 Al Bino 416-317-4840

To print the report, click on the report to make that screen active then choose **Print** from the menu bar at top left of the screen.

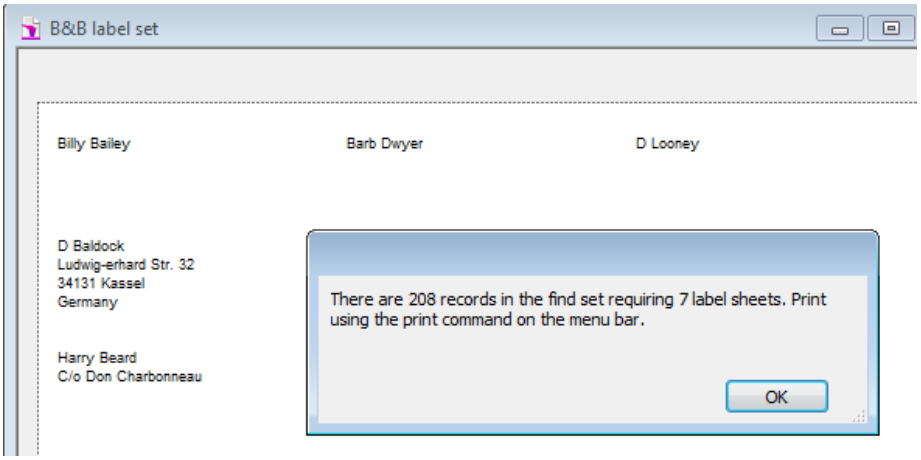
Mailing Labels

The label sheet has been formatted to fit the readily available Avery 5160 label sheet (3 x 10).



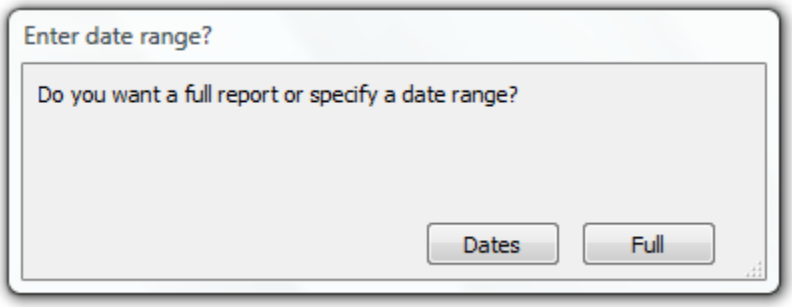
To set-up your attached printer and print the label sheet, go to 'File' on the menu bar at the top left of the screen.

Close the label sheet layout by clicking on the X at top right corner of the window.

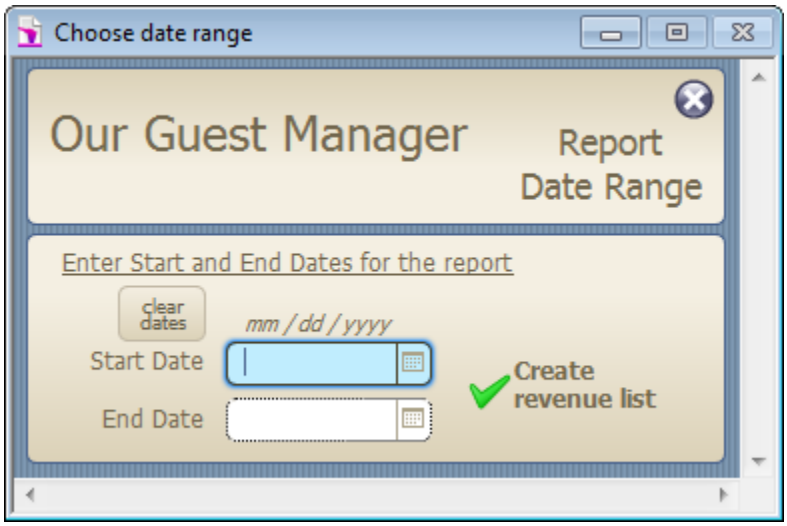


Revenue Report

When running the Revenue list you are asked whether to give you a list of everything in the database or to select a range of booking dates.



If you choose a range of dates, you are presented with –



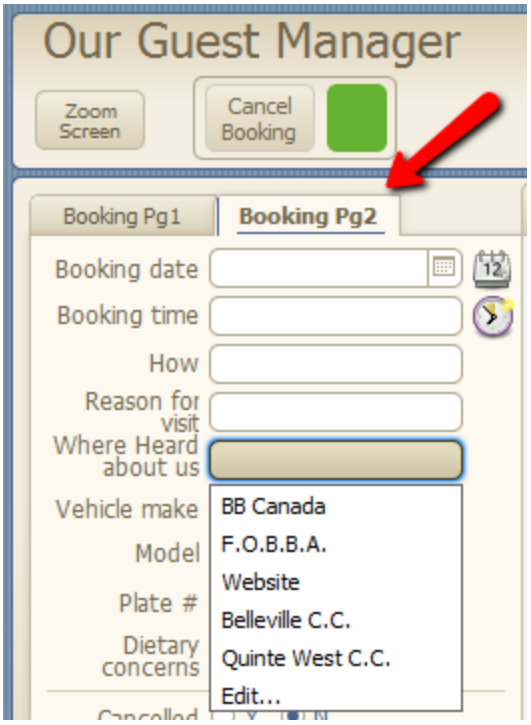
This report is based on the first night of stay. Enter the Start and End report dates in mm/dd/yyyy (05/01/2013) format. Click 'Create revenue list' to create the report.

List of Revenue, based on arrival night only — **The Groves B & B** — Page 1

Date Range: 3/1/2013 to 3/31/2013

First Night	Last Night	Booking #	Names	Nights	Room Net	Misc	HST	Extras	Tax	Total	Balance Due
March, 2013											
Forestview Suite											
3/2/2013	3/12/2013	148	Jack Knoff	11	1,155.00		150.15			1,305.15	1,305.15
3/15/2013	3/15/2013	145	Ivy Leage	1	105.00		13.65			118.65	118.65
Total for Forestview Suite for March				12	1,260.00		163.80			1,423.80	1,423.80
Master Suite											
3/1/2013	3/1/2013	7	Al Seltzer	1	95.00		12.35			107.35	107.35
3/1/2013	3/22/2013	96	Frank Enstein	22	2,090.00		271.70			2,361.70	2,361.70
3/14/2013	3/14/2013	8	Alf Romeo	1	95.00		12.35	40.00	5.20	152.55	152.55
3/15/2013	3/15/2013	146	Jack Goff	1	95.00		12.35			107.35	107.35
Total for Master Suite for March				25	2,375.00		308.75	40.00	5.20	2,728.95	2,728.95
Total for Month of March				37	3,635.00		472.55	40.00	5.20	4,152.75	4,152.75
Report Total				37	3,635.00		472.55	40.00	5.20	4,152.75	**4,152.75**

Marketing Report



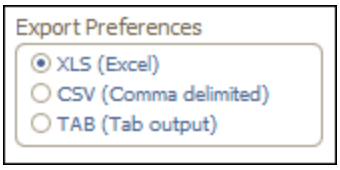
The Marketing report provides a list and number of bookings made based on entries in the *Heard about us* field on Page 2 during the booking process.
The list is editable.

You have the option of running a full list or entering a date range of your choice.

Lead report

Year	Lead from	Bookings
2013		
	BB Canada	2
	Belleville C.C.	1
	Not entered	215
	Website	4
	Bookings during 2013	222

Export emails



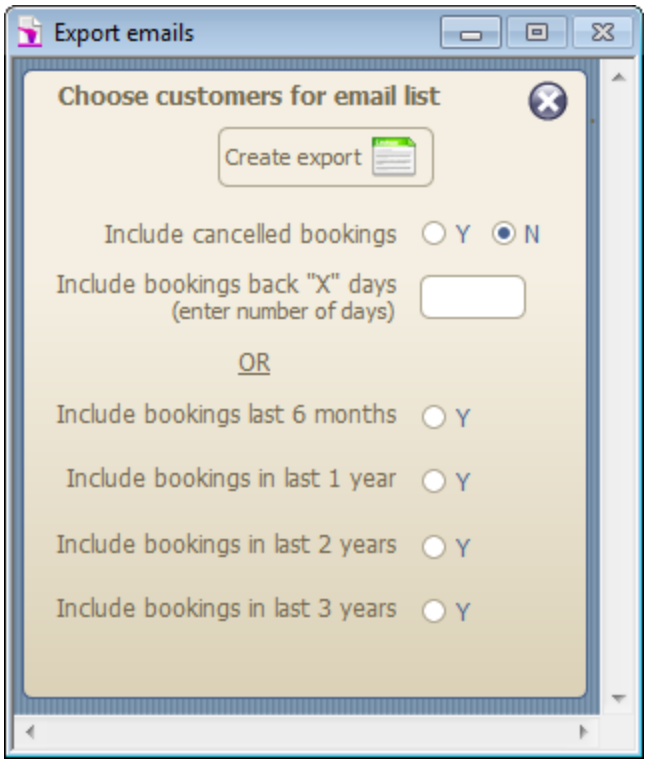
The Export emails function allows you to export your customer name and email fields, from the bookings section to the format specified in the Program Set-up preferences section (.xls, .csv, tab)

NOTE: You will have an entry for each booking made by a customer with .csv and .tab format, meaning multiple lines if there is more than one booking by that customer. The .xls format will only show one line per customer name.

This export file will allow you to send promotional, or other, emails in bulk if you wish.

You have the choice of including cancelled bookings and how far back, in days, you want to include in your email marketing campaign.

Enter the number of days you want to go back or click on the convenient buttons for 6 months, 1 year, 2 years or 3 years.

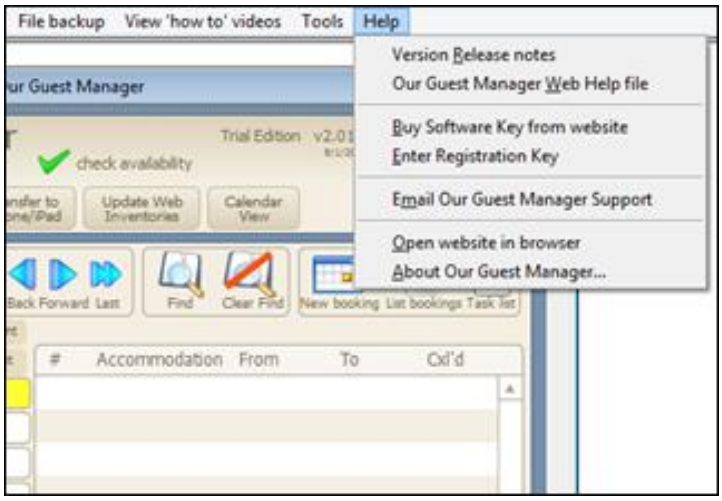


Utilities

File backups

The first time that the program is opened each day, copies of the data files are transferred to the Backup folder you specify during system setup. By default the system uses the location created at time of program installation. See the Appendix for the folders that should be included in your usual daily data back up routine. You may run the backup whenever you want by clicking on the File Backup menu item.

Trial Edition



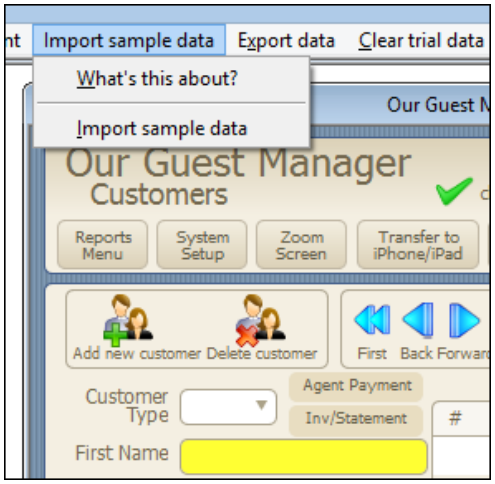
Help tab

From the 'Help' tab on the menu bar users of the limited-use Trial Edition have access to –

- ✓ The current version Release notes
- ✓ Live connection to this Help file on our website
- ✓ The ability to connect to the website to purchase an Upgrade key
- ✓ Ability to enter the acquired Registration key
- ✓ Send email to Support@OurGuestManager.com
- ✓ An 'About' screen with Our Guest Manager contact and program version information

Menu bar features

Import sample data

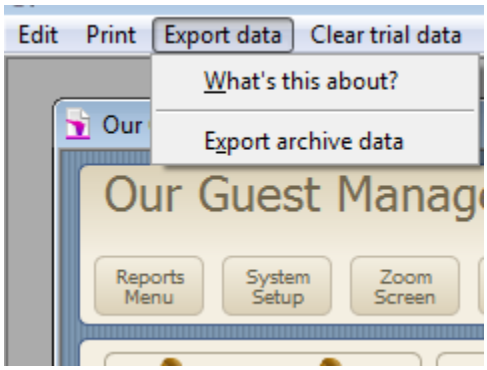


Choosing to *Import sample data* will add two 'Guest' and one 'Agent' customer and bookings for those customers to the system to allow you to "play" with Our Guest Manager while becoming comfortable with the system.

NOTE: During the installation process, you will be asked if you with to add these samples. If you answered 'No' at that time, you can import the sample data from the menu bar.

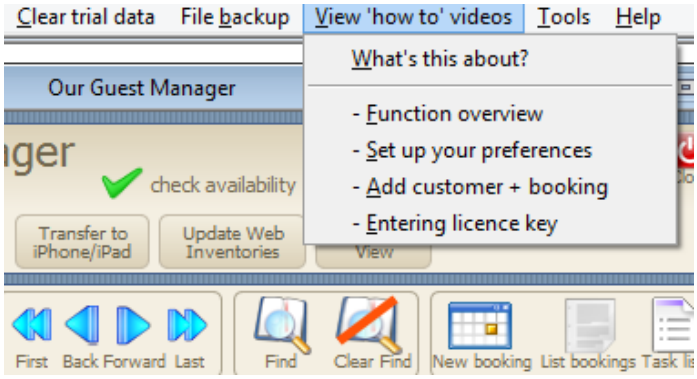
Be sure to Clear this sample data (or delete the records) before going "live"

Export data



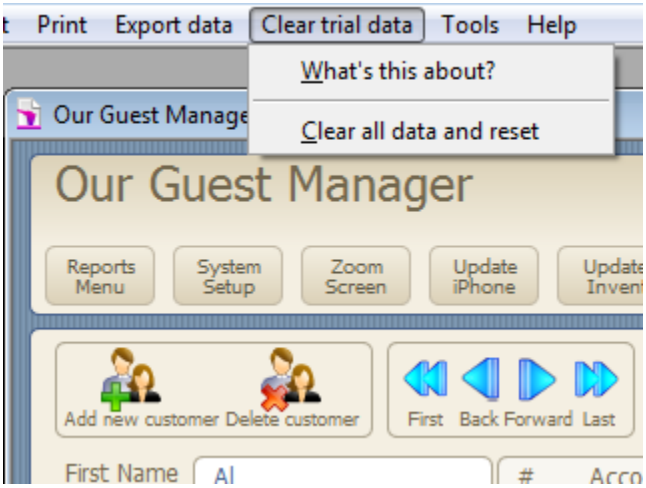
- ✓ Export data
  - An information page to show what this function does
  - The ability to export any data you enter during the trial period to a desktop file

View 'how-to' videos



- ✓ Clicking on one of the four video titles will open your browser and connect to our videos on the Documentation page of our website *www.OurGuestManager.com*.

Clear trial data

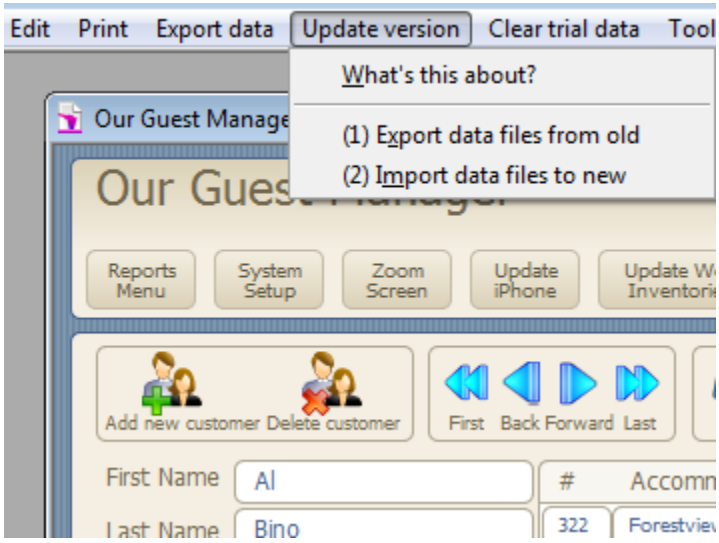


- ✓ Clear trial data
  - An information page to show what this function does
  - The ability to clear all test data you might have entered while getting to know the system.

NOTE: Clearing the data will reset the system back to Trial Edition, deleting all customers, bookings and system set-up entries.

Registered Editions

In addition to the Utility items available in the Trial Edition, the Registered Edition includes version update items.



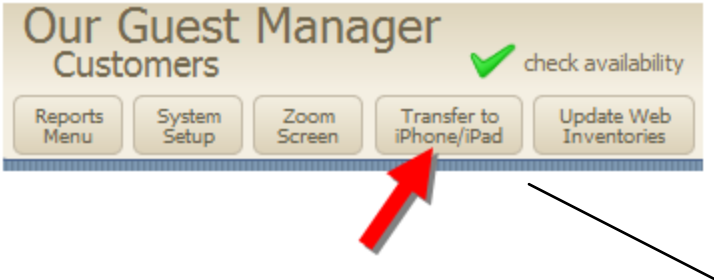
Update version

- ✓ Update version
  - An information page to show what this function does
  - Ability to export the data already entered into the system
  - Ability to import the exported data to the new version

NOTE: A full description of the program Update process is contained in the Installation & Update Guide.

Transferring data to Apple iOS mobile device

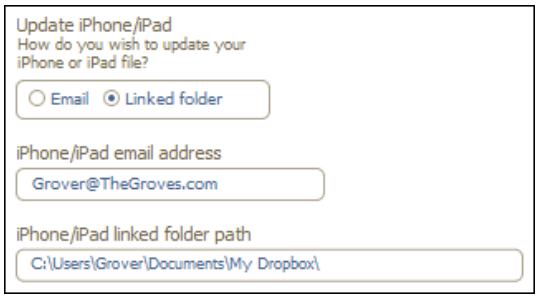
The Our Guest Manager includes the ability to transfer your up-to-date customer and reservation databases to your iPhone, iPad or iPod Touch (the iOS device) equipped with the FileMaker GO app installed (available for free from the App Store).



Although there isn't a live link to your home file, on demand, you can take a copy of all customers in your database as well as all non-cancelled reservations after "today", the day you perform the transfer, with you.

Files can be transferred to the iOS device either by email or by placing the file in a linked folder using Dropbox or other synchronizing web based folder.

The method used depends on settings you make in System Preferences.



Screen shots of iPhone database

Main menu

Fido 6:07 PM 92%
List by month
- quick find -
- find month -
May 2012
Faith Christian
IN Tue, May 8/12 Master Suite
OUT Thu, May 10/12 Nights 2
June 2012
Lois Price
IN Fri, Jun 1/12 Master Suite
OUT Sun, Jun 3/12 Nights 2
April Schauer
IN Tue, Jun 12/12 Forestview
OUT Thu, Jun 14/12 Nights 2
April Schauer
IN Tue, Jun 12/12 Master Suite

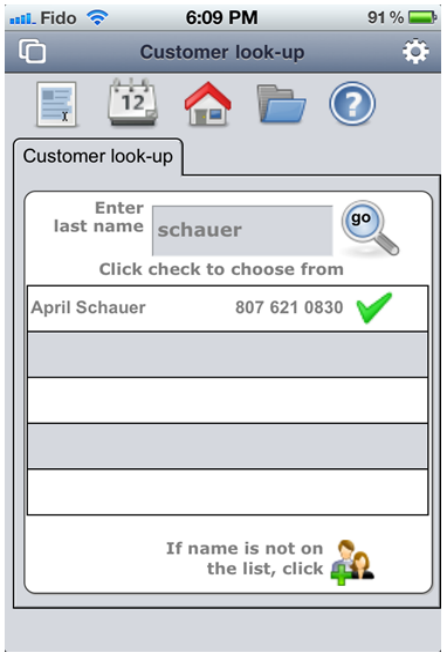
View bookings by Month

Fido 6:08 PM 92%
List by accommodation
- quick find -
- find accom -
Forestview Suite
June 2012
April Schauer
IN Tue, Jun 12/12 (Forestview Suite)
OUT Thu, Jun 14/12 Nights 2
Max Little
IN Tue, Jun 26/12 (Forestview Suite)
OUT Fri, Jun 29/12 Nights 3
September 2012
Leigh King
IN Tue, Sep 11/12 (Forestview Suite)
OUT Thu, Sep 13/12 Nights 2
November 2012

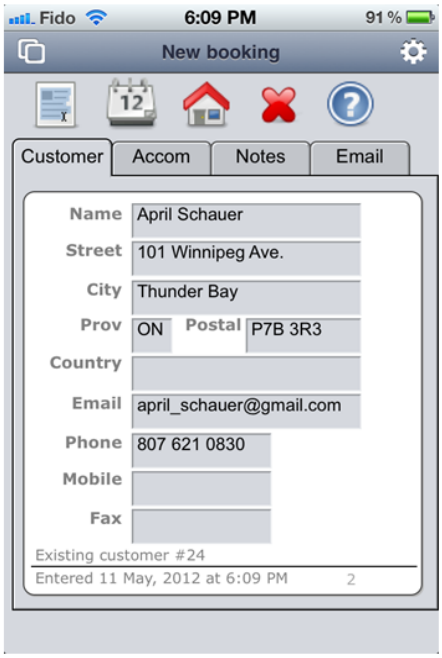
View bookings by Accommodation

Customer view
[place call or email from here]

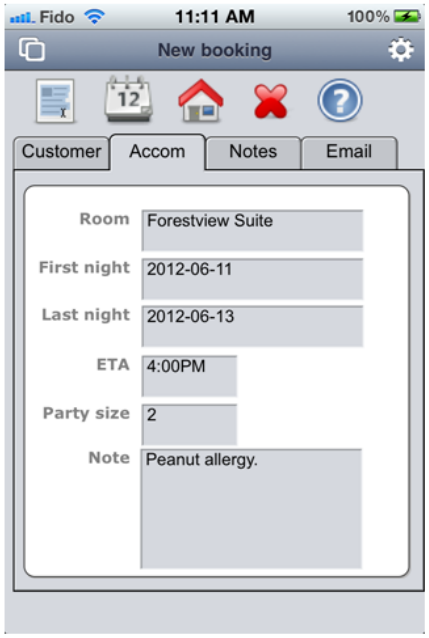
Look up by month



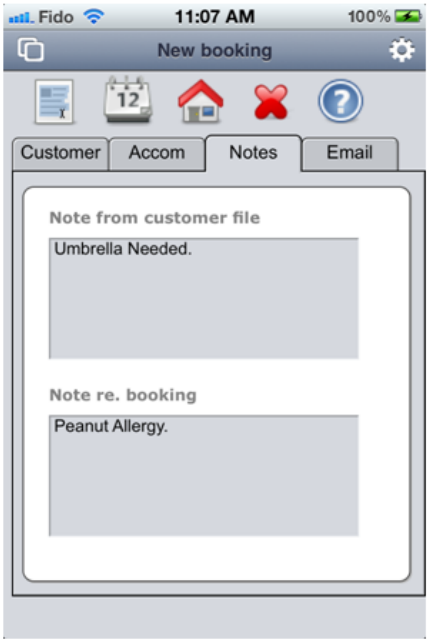
Look up customer to record a new booking



Existing customer detail transferred to booking

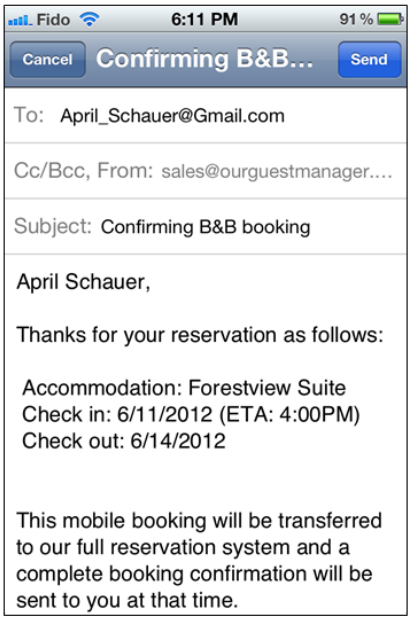


Enter accommodation



Notes screen

Email menu


Fido
6:11 PM
91 %
Cancel
Confirming B&B...
Send
To: April_Schauer@Gmail.com
Cc/Bcc, From: sales@ourguestmanager....
Subject: Confirming B&B booking
April Schauer,
Thanks for your reservation as follows:
Accommodation: Forestview Suite
Check in: 6/11/2012 (ETA: 4:00PM)
Check out: 6/14/2012
This mobile booking will be transferred to our full reservation system and a complete booking confirmation will be sent to you at that time.

Email to customer

Email to office

Screen shots of iPad database

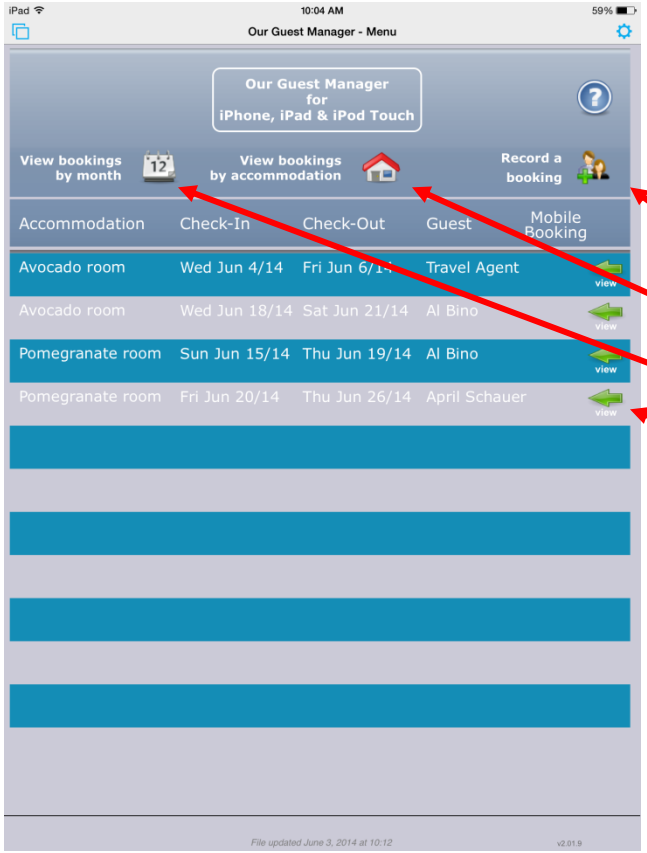
The mobile module has now been optimized for Apple iPad use as well as continuing the same functionality for iPhone. The iPhone has the added ability to phone customers from Customer list.

An additional feature has been added to retain any bookings entered while using the iOS device in the mobile file.

NOTE: This data will be overwritten the next time you download a new file from the main data file.

Keep in mind that entries added to the mobile file will have to be re-entered into the main data file on your home/office computer.

iPad Menu screen

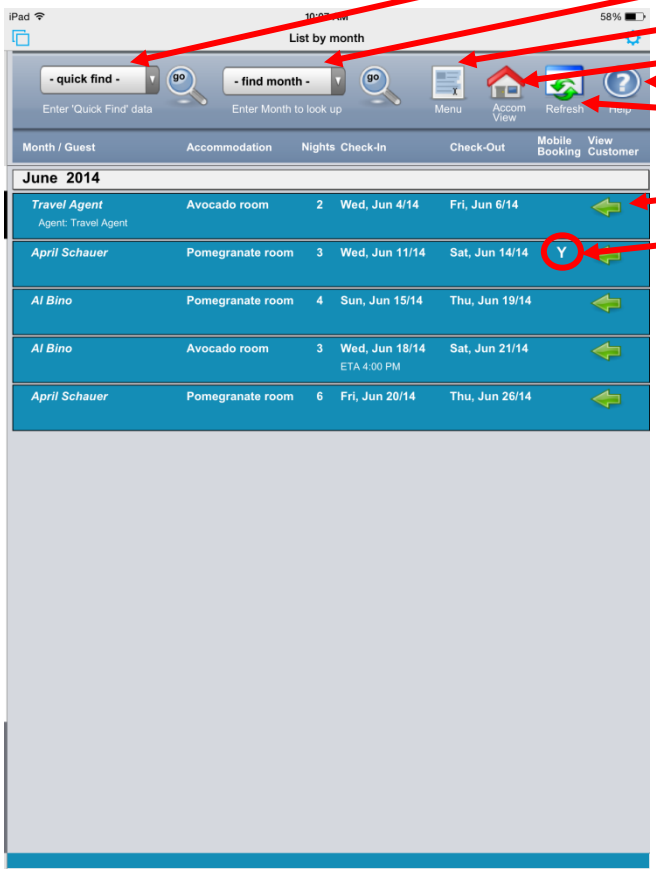


From the main menu screen on a iPad, you see at a glance up-coming bookings in chronological order.

Touch on the icons to access:

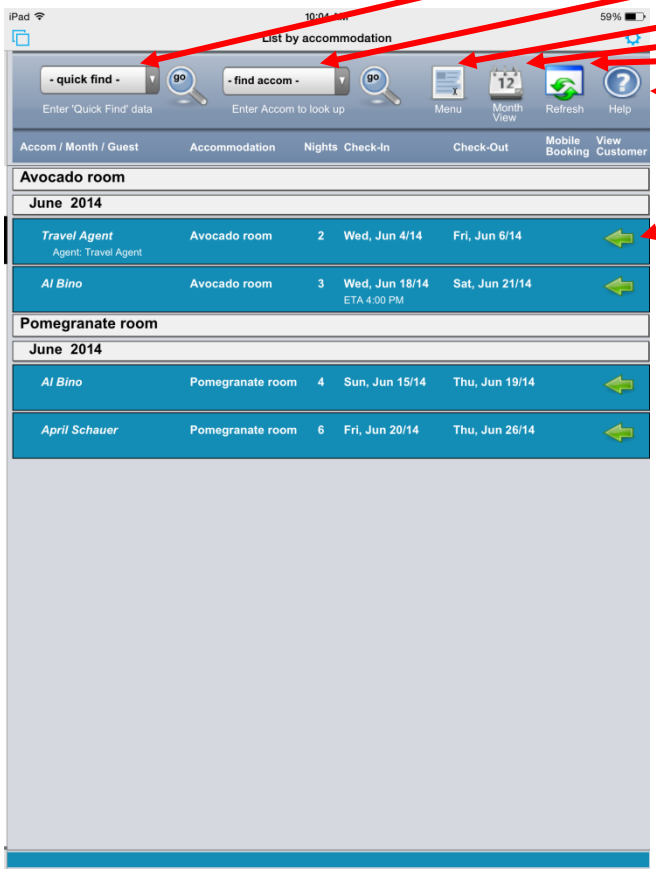
- record a booking
- list by accommodation
- list by month
- view customer bookings

iPad List Month screen



- Quick find lookup by name
- Find month
- Go to Menu view
- Go to accommodation view
- Help
- Refresh screen
- Go to Customer
- "Y" indicates a booking entered while mobile

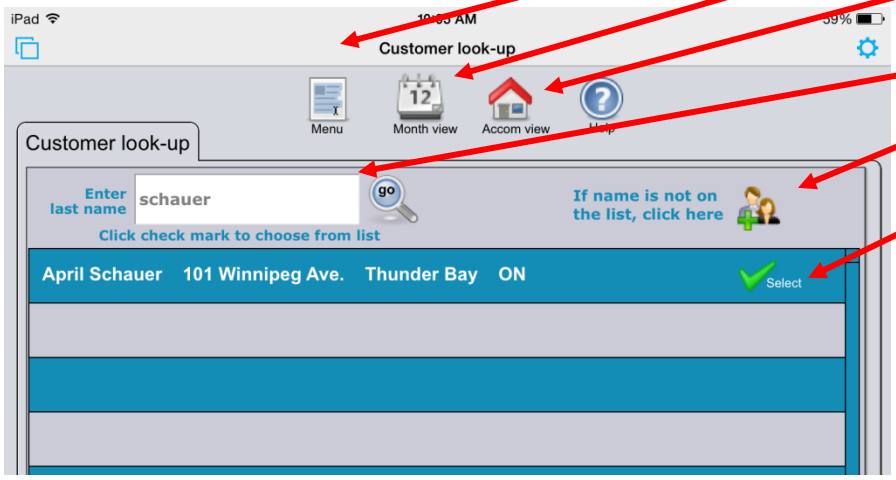
iPad List Accommodation screen



- Quick find lookup by name
- Find accommodation
- Go to Menu view
- Go to month view
- Refresh screen
- Help
- Go to Customer view

iPad Add Booking screen

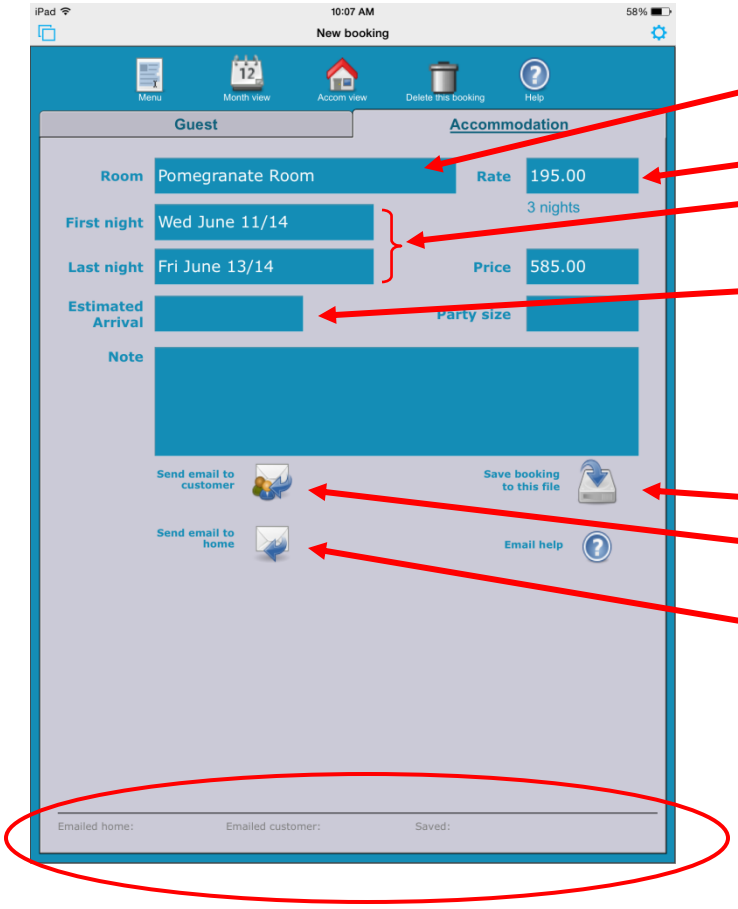
(choose existing customer)



- Go to Menu view
- Go to month view
- Go to accommodation view
- Help
- Look up last name
- Create booking if name is not on list
- Create booking if name is on list

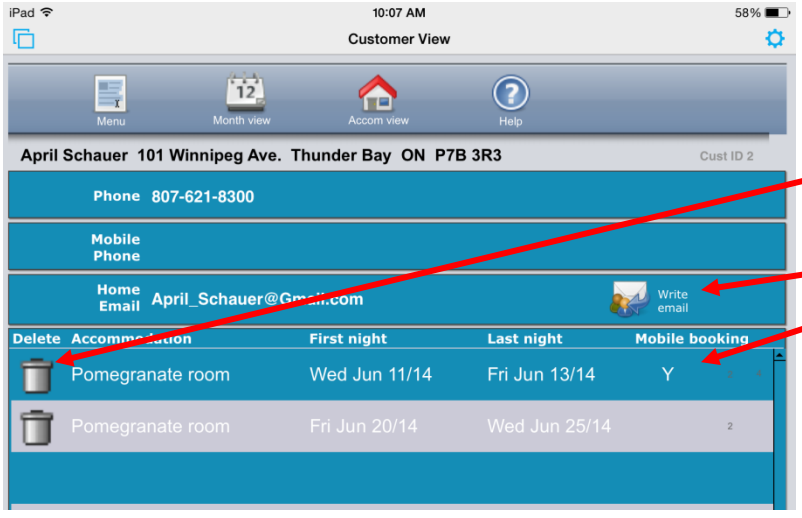
- Go to Menu view
- Go to month view
- Go to accommodation view
- Help
- Abort this booking

- If customer already existed, information is transferred to this screen
- If customer is new, data fields can be entered manually
- customer note transfers from main module
- booking note can be added



- Room field has a pick list of your rooms
- Rate field
- Date fields have standard iOS rolodex date picker
- Estimated arrival field has pick list or can be entered manually
- Save booking on mobile file
- Send email confirmation to customer
- Send email of booking detail to yourself for re-entry into main Our Guest Manager module
- Status area showing emailing dates and record saved date

iPad Customer screen



- Delete booking [mobile additions only] from this file
- Write email to customer
- "Y" indicates mobile booking

Contacting Our Guest Manager

Snail mail

Our Guest Manager
315 Airforce Crescent
Miramichi, NB Canada E1N 2L9

Email

Support@OurGuestManager.com

NOTE: The Support Package includes email support only. Although support is free, a new licence key should be requested annually to keep our customer files up to date.

Support is limited to the functionality of the software only.

Although we can assist with web design, wireless network and email systems set-up, this is charged at an hourly rate.

Our Guest Manager is a division of

DataWizard.ca.

Brian Girling
Data Management Consultant
226.444.6511
brian@datawizard.ca
Skype: brian.girling1
www.datawizard.ca

"Let us help you navigate through your business data fog."

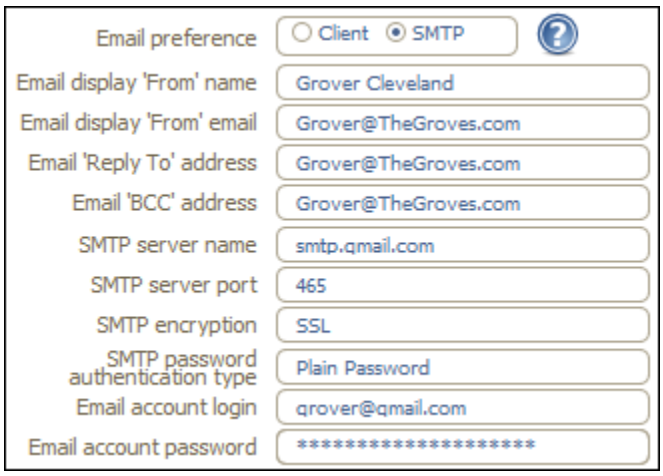
Appendix

SMTP settings for Gmail.com, Mail.com, Authsmtp.com, Yahoo.ca (.com)

NOTE: As of version 2.01.4 (released May 8 2013) there is a built-in SMTP test module to assist with getting the settings right.

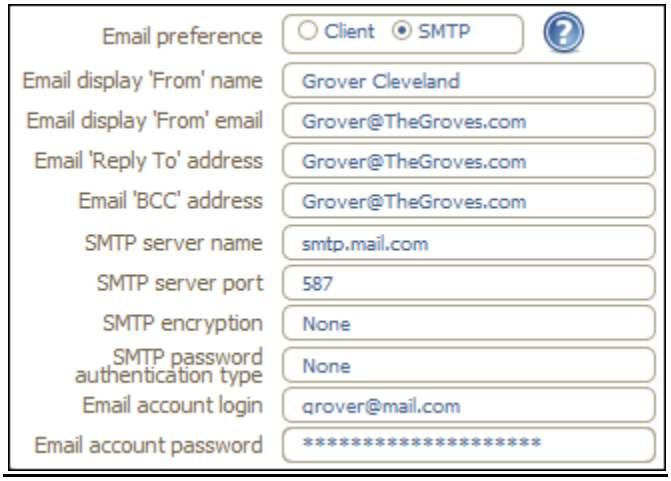
Our Guest Manager has been tested using SMTP (Simple Mail Transfer Protocol) outgoing email settings for –

Gmail.com

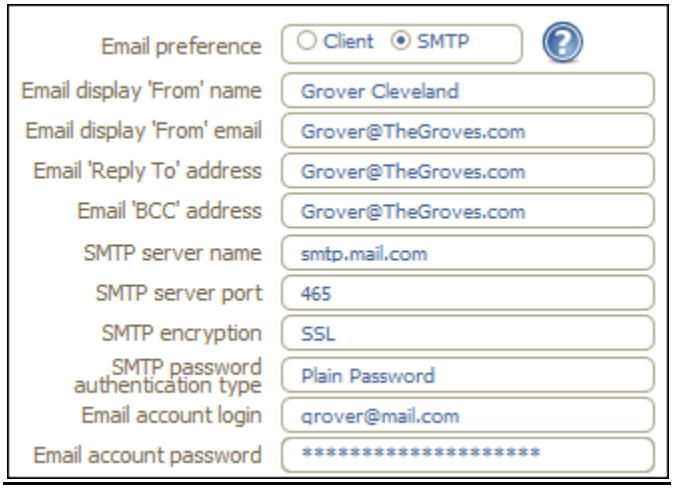


SSL on

Mail.com

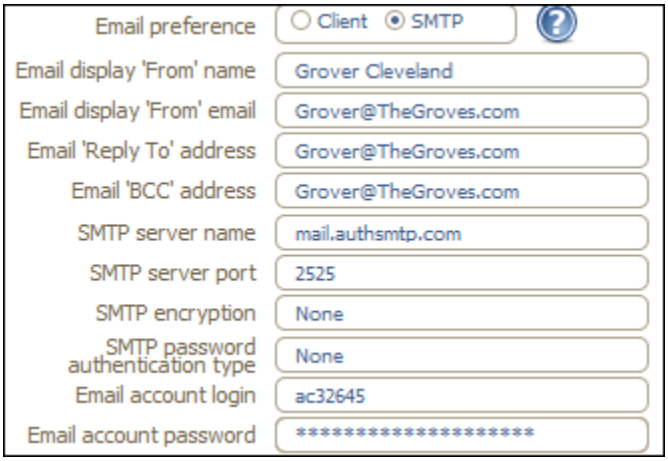


SSL off



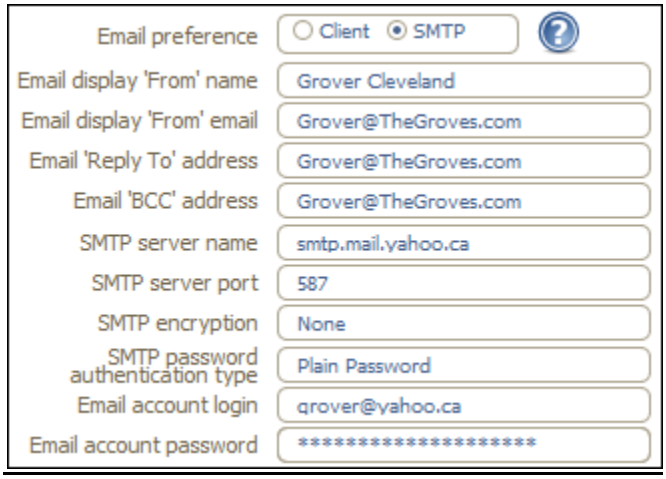
SSL on

AuthSMTP.com

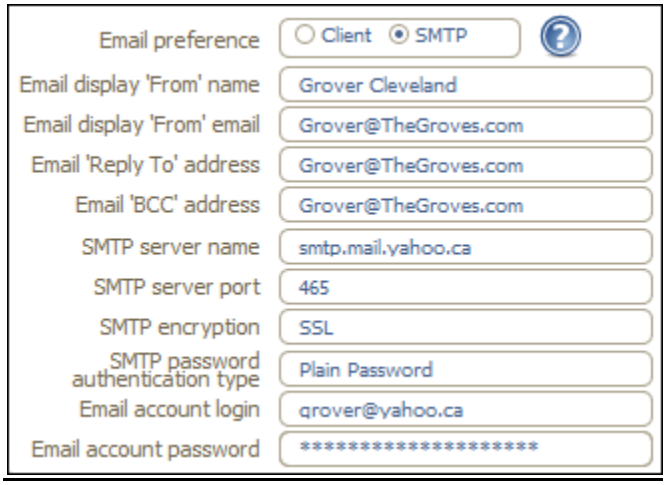


NOTE: Make sure that the 'From' address is in your AuthSMTP authorized mailed from list.

Yahoo.ca or .com



SSL off



SSL on

Your own website SMTP server

Ask your website provider for SMTP settings.

Using Dropbox with iPhone

What is Dropbox?

Dropbox is a 'cloud' or internet based service that allows you to store files from your PC in a personal and secure folder on the internet. With a corresponding 'app' from iTunes intalled on your iOS device (iPhone, iPad, iPod Touch) you can access files in the Dropbox folder from your mobile device.

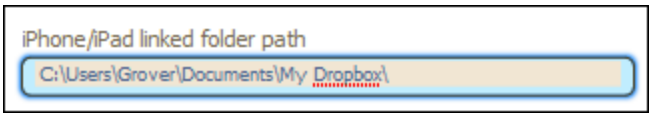
On the PC

Visit www.dropbox.com and set up a free account. This will allow you to have a storage folder of up to 2GB. Above that amount, a paid Dropbox account is required.

Download Drop box to your PC. Installing Dropbox will likely create a folder such as

C:\Users\Grover\Documents\My Dropbox

Once installed, place the routing path into the System Set-up/Preferences section of Our Guest Manager.

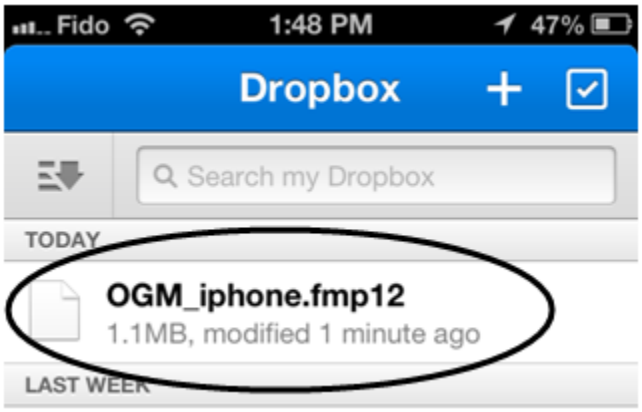


This will tell Our Guest Manager where to place the updated data file *OGM_iphone.fmp12* into your Dropbox folder.

On the iOS device (iPhone, iPad, iPod Touch)

Download and install the free Dropbox app from the iTunes app Store. Set it up according to instructions provided.

After you have transferred the Our Guest Manager file to your Dropbox folder, it will show up as –

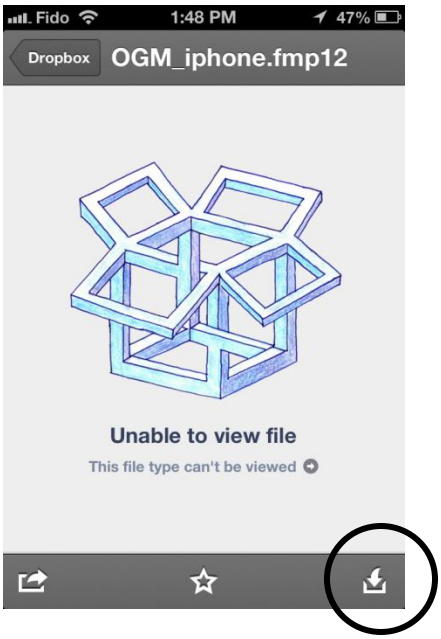


Using FileMaker GO on iPhone

Once you have installed the FileMaker GO app onto your iOS device, it is ready to open the file placed in the Dropbox folder previously.

Open the Dropbox application and navigate to the *OGM_iphone.fmp12* file.

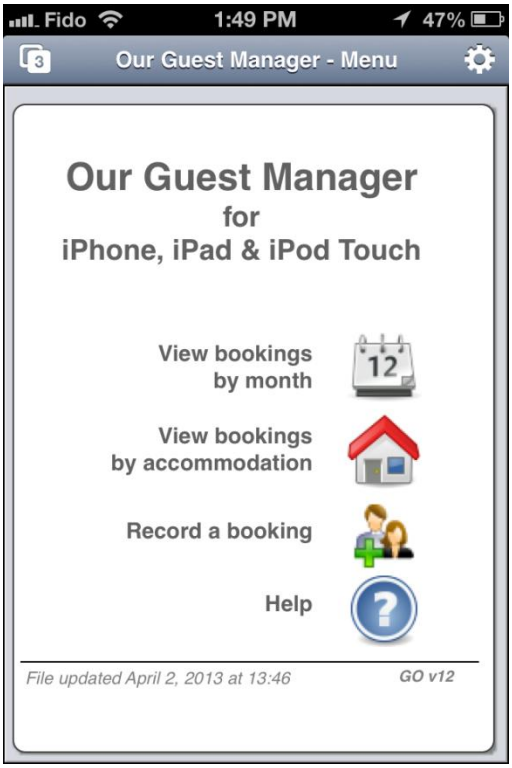
- ✓ Click on the file
- ✓ After attempting to open the file, Dropbox will display



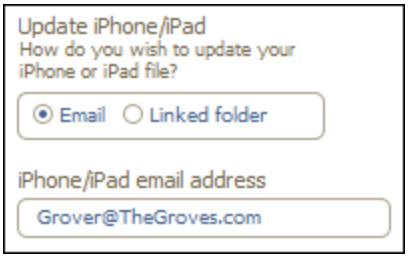
- ✓ Click on the 'download' button and you will see

- ✓ Click on 'Open in FileMaker Go'

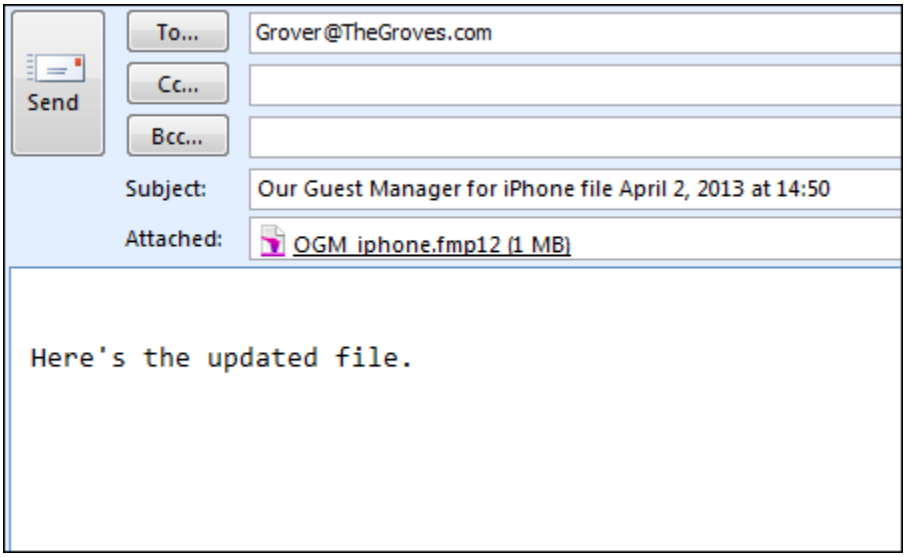
✓ FileMaker GO will open and show – and you are ready to go



NOTE: If you prefer to email the file to your iOS device rather than use Dropbox, make the appropriate choice during Our Guest Manager Program set-up.



If you send your emails from Our Guest Manager using an email Client program (as set up in Program Set-up), your email Client will open –



Note that the updated file will be pre-addressed using the email set up in the iOS section of Program set-up.

Once you have received this email on your mobile device, open the file using FileMaker GO and you are ready to go.

NOTE: If your email set-up is using an SMTP server, the email will be mailed directly without opening your email client.

Folders created and used by Our Guest Manager

Main program	c:\users\%username%\Our Guest Manager
Backup folder	c:\OGM_backup
Update folders	c:\OGM_Update and c:\OGM_Update_last

NOTE: Although the default data file backup location is on your C: drive at installation, you may customize this during system setup.

Please be sure to include these four folders, and any sub-folders, in your regular data backup routine.